United States Department of Agriculture

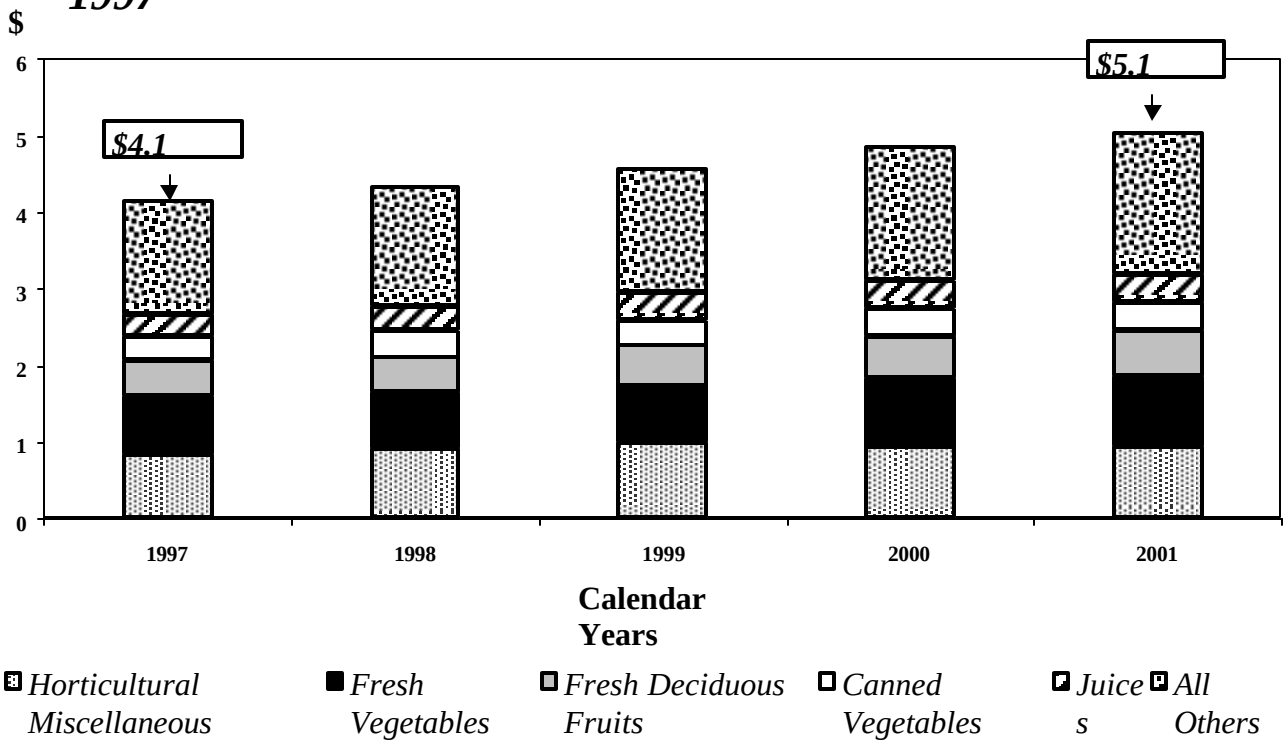
Foreign Agricultural Service

Circular Series
FHORT 12-02
December 2002

World Horticultural Trade and U.S. Export Opportunities

U.S. Exports of Horticultural Products To Countries of the Proposed FTAA

Value of U.S. Shipments Has Expanded by $1 Billion Since 1997



Source: U.S. Bureau of the Census

U.S. exports of horticultural products to these countries in the Western Hemisphere (excluding Cuba) reached a record $5.1 billion in calendar year 2001, up 4 percent from shipments in 2000 and over 40 percent above the value exported 7 years ago. The miscellaneous category, valued at nearly $1 billion, accounted for about 20 percent of total U.S. horticultural sales to the region last year. The top products in this category were beer and potato chips. Fresh vegetables ($893 million), fresh deciduous fruits ($596 million), canned vegetables ($380 million), and fruit and vegetable juices ($363 million) were among the largest U.S. horticultural shipments to the Western Hemisphere in 2001. Aside from Canada and Mexico, key U.S. export markets in the region were Venezuela ($69 million), Brazil ($65 million), The Bahamas ($54 million), and the Dominican Republic ($50 million). On November 1, 2002, trade ministers of the 34 democracies in the Western Hemisphere met in Quito, Ecuador, to continue negotiations seeking to complete the Free Trade Area of the Americas (FTAA) by January 1, 2005.

[Check Out the New U.S. Trade Internet System Website. Go to http://www.fas.usda.gov/ustrade]

Approved by the World Agricultural Outlook Board/USDA

For further information, contact:
U.S. Department of Agriculture - Foreign Agricultural Service
Horticultural and Tropical Products Division
1400 Independence Ave., S.W., Stop 1049
Washington, DC 20250-1049
Telephone: 202-720-6590
Fax: 202-720-3799
http://www.fas.usda.gov/htp

Frank Tarrant, Director
Scott Bleggi, Deputy Director for Marketing
Larry Deaton, Deputy Director for Analysis

ANALYSIS		
Kyle Cunningham	202-720-0875	Tree nuts, processed vegetables (excl. potatoes), EU regional analysis, circular team and homepage coordinator
Nancy Hirschhorn	202-720-2974	Situation and outlook supervisor, publication editor, export forecast coordinator, briefing paper coordinator, key development coordinator, stone fruit, nursery products, avocados, potatoes
Bob Knapp	202-720-4620	Canned deciduous fruit, sugar, EU regional analysis, tree nuts
Emanuel McNeil	202-720-2083	Fresh and processed vegetables (excl. potatoes), cut flowers
Martin Patterson	202-720-7304	Policy issues coordinator for subsidies and tariff issues, tariff rate quotas and licensing, trade agreements, multilateral policy issues, biotechnology issues SPS/food safety/quality issues coordinator, bilateral technical and policy issues
Debra A. Pumphrey	202-720-8899	Fresh and processed citrus; coffee; U.S. trade questions on tea, cocoa, essential oils and spices; and information technology coordinator
Sam Rosa	202-720-6086	Fresh deciduous fruit, trade issues database coordinator, apple juice, olives, mushrooms
Rey Santella	202-720-0897	Dried fruit, berries, beer/hops, melons, circular web team
Ryan Scott	202-720-6877	Special projects, circular web team, tropical fruit
Heather Velthuis	202-720-9792	Wine, brandy, table grapes, grape juice
MARKETING		
Ted Goldhammer	202-720-8498	Potatoes (marketing), apples, hops, sweet cherries, QSP
Krista Dickson	202-690-1341	Dried Plums, Canned Fruit, and Tomatoes
Sonia Jimenez	202-720-0898	Citrus, winter pears, peaches, plums, nectarines, Section 108
Kristin Kezar	202-690-0556	Tart cherries, canned fruit, papaya, melons, raisins, kiwifruit (analysis and marketing), EMO program
Elizabeth Mello	202-720-9903	Vegetables, berries, Cochran program, Produce Marketing Association (PMA), Chocolate Manufacturers Association
Ingrid Mohn	202-720-5330	Tree nuts, prunes (dried plums)
Elias Orozco	202-720-6791	Honey (analysis & marketing), website updates
Steve Shnitzler	202-720-8495	Apricots, avocados, ginseng, pomegranates, Bartlett pears
Yvette Wedderburn-Bomersheim	202-720-0911	Wine, grape juice, table grapes, Export credit programs

Table of Contents

PAGE

FEATURE ARTICLES:

WORLD TRADE SITUATION AND POLICY UPDATES:

EXPORT NEWS AND OPPORTUNITIES:

STATISTICS:

Export Summary
September

U.S. exports of horticultural products to all countries in September 2002 totaled $891 million, up almost 2 percent from September 2001. The categories with significant increases in September were essential oils (up 30 percent to $61 million), tree nuts (up 30 percent to $146 million), and fruit and vegetable juices (up 6 percent to $55 million). The categories with the most significant decreases were wine and beer (down 19 percent to $52 million), fresh fruit (down 8 percent to $166 million), and fresh vegetables (down 5 percent to $70 million).

September 2002 exports to Canada, the top market, were up 12 percent from September 2001 to $276 million. Exports to the European Union (EU) rose 3 percent to $167 million, while sales to India rose 20 percent to $15 million, sales to the United Arab Emirates rose 97 percent to $12 million, and sales to Saudi Arabia increased 44 percent to $7 million. September exports to Japan dropped 7 percent to $97 million, while sales to Hong Kong fell almost 14 percent to $35 million.

Exports for the October-September fiscal year (FY) 2002 period were slightly above the FY 2001 level at $11.1 billion. Tree nut exports were up about 9 percent to $1.2 billion for the 2001/02 period, while essential oils exports were up 13 percent to $764 million. Fruit and vegetable juices rose about 1 percent to $728 million, and fresh vegetables rose about 1 percent to $1.2 billion. All of the other major categories declined.

Exports to Canada rose 7 percent to $3.6 billion for the October-September period, while exports to the EU fell about 2 percent to $2 billion and exports to Japan fell 6 percent to $1.5 billion. Exports to Mexico rose 2 percent to $988 million. Exports to Korea rose 19 percent to $346 million, while exports to Hong Kong and Taiwan dropped 10 percent, and 22 percent, respectively, compared with FY 2001. In addition to Korea, the fastest growing markets for FY 2002 include: Russia, up 59 percent; India, up 22 percent; Kuwait, up 26 percent; the United

Arab Emirates, up 15 percent; the Dominican Republic, up 11 percent; Colombia, up 10 percent; and Indonesia, up 6 percent.

SPECIAL ANNOUNCEMENTS!!!

To access FAS Attaché Reports online, please reference the following Internet address:

http://www.fas.usda.gov/scriptsw/attacherep/default.asp

Search through the country and market reports prepared by FAS attachés covering over 20 horticultural and tropical product commodities and nearly 130 countries. Search by keyword, including country and commodity.

Visit the HTP Homepage!

The Horticultural & Tropical Products (HTP) Division Homepage is updated weekly to bring the latest information to the public on policy and technical developments affecting trade in horticultural commodities. For further information on this site, please contact Nancy Hirschhorn (202) 720-2974. Go to http://www.fas.usda.gov/htp.

As of January 1, 2003, HTP will no longer be publishing hard copies of the following circulars:

Sugar: World Markets and Trade. This will be available on our website in May and November and will be released at 3:00 p.m. on the scheduled release date.

Tropical Products: World Markets and Trade. This will be available on our website in March, June, September, and December and will be released at 3:00 p.m. on the scheduled release date.

World Horticultural Trade and U.S. Export Opportunities. Individual feature articles will be posted regularly on our website. The December issue will be the final printed version.

The written monthly publication ***World Horticultural Trade and U.S. Export Opportunities*** will be replaced by a new written quarterly publication: ***FAS Quarterly Reference Guide to World Horticulture,*** which will comprise the following issues:

Production, Supply, and Distribution Edition (To be published January 15, 2003)
Charts Edition - illustrating major trade trends, country features, and commodity features (To be published April 1, 2003)
Trade Data Edition (To be published July 1, 2003)
Trade Policy Edition (To be published October 1, 2003)

For further information, please contact Nancy Hirschhorn at 202-720-2974 or send an email to htp@fas.usda.gov.

USDA Launches Production, Supply, and Demand Database Site

WASHINGTON, Aug. 26, 2002 – The Foreign Agricultural Service (FAS) announced a new on-line database web site that provides current and historical USDA data on production, supply, and distribution of agricultural commodities for the United States and key producing and consuming countries.

The data, which goes back as far as 1960, provides users with a complete global picture--all commodity-specific attributes, countries, and years are available. Users can view all facets of the database onscreen or download to a spreadsheet file. Pre-defined tables categorized by commodity groups are readily available, or the user can create custom queries for specific commodities. E*xample: Barley*

Argentina	*2001*	*2002*
Area harvested	*240*	*250*
Production	*510*	*600*
Yield	*2.13*	*2.4*

The site includes 108 commodity groups and over 190 countries. The information will be particularly useful for commodity traders, agricultural importers, exporters, economists, producers, and researchers who can use the information to determine future prices, production levels, and demand for agricultural products.

The production, supply, and demand database site can be found at Internet address: http://www.fas.usda.gov/psd

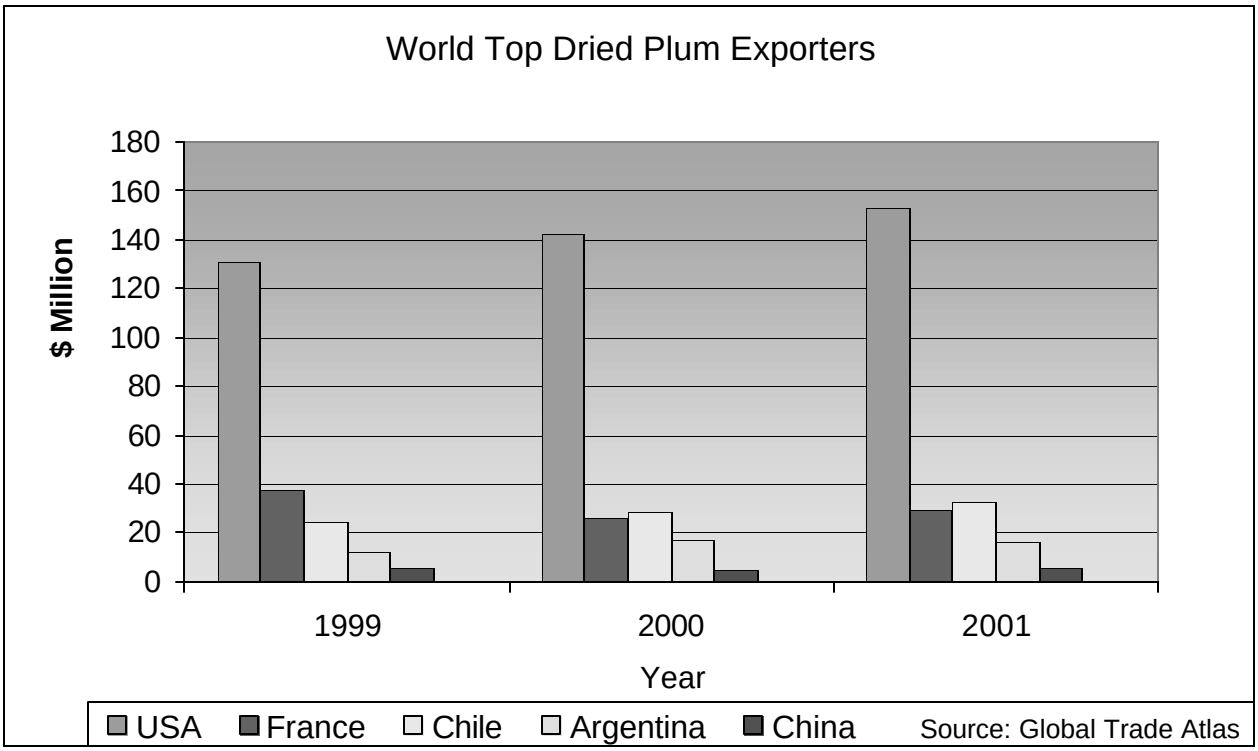
For further information, please E-mail: PSDOnline@fas.usda.gov

International Food and Drink Exhibition (London, United Kingdom – March 23-26, 2003).

The International Food and Drink Exhibition (IFE) is the United Kingdom's (U.K.) leading food and drink trade exhibition. A biennial event, IFE attracts approximately 38,000 visitors. IFE has a reputation for attracting U.K. buyers from key sectors of interest to U.S. companies – importers, retailers, and foodservice buyers. It is particularly useful for new-to-market companies with shelf-stable or frozen grocery products. Best product prospects include: wine, beer, tree nuts, processed fruits and vegetables, fresh fruit, sauces and marinades, confectionery, snack foods, egg products, non-soy vegetable oil, organic products, soft drinks, bakery ingredients, seafood, and frozen foods. For more information on this USDA-endorsed show, please call Sharon Cook/FAS Trade Show Office at 202-720-3425 or Sharon.Cook@fas.usda.gov

Dried Plum (Prune) Situation and Outlook in Selected Countries

Lower production in the United States and France, the two largest dried plum-producing countries, is expected to lower global dried plum supplies by 1 percent in 2002/03 to 204,276 tons from 206,656 tons. Dried plum exports are expected to fall nearly 9 percent as a result of smaller crops and flat international demand.



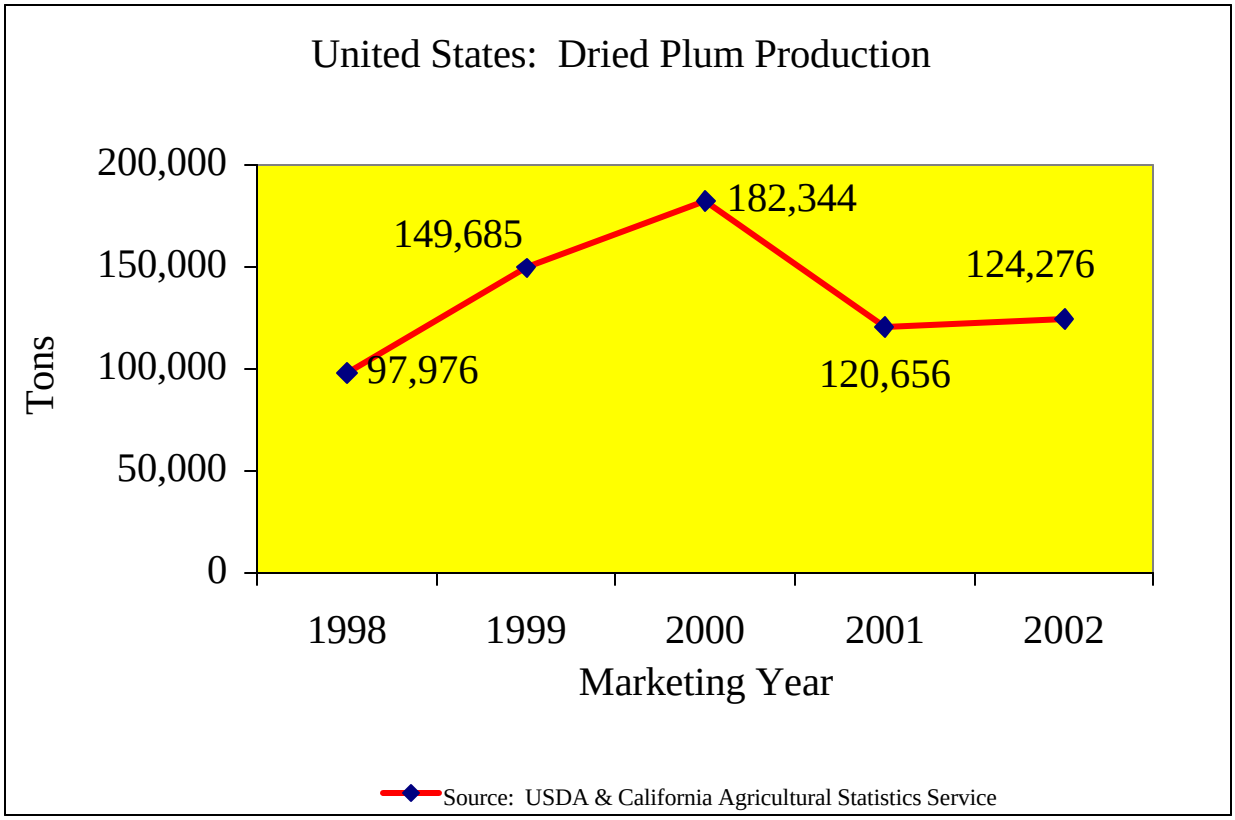
United States

The United States is the top exporter of dried plums in the world. In calendar year (CY) 2001, U.S. dried plum exports totaled over $153 million. Between 1999 and 2001, total U.S. dried plum exports averaged over $142 million. The United States' top export markets - Germany, Japan, Italy, the U.K., and Belgium - comprised nearly 65 percent of its dried plum markets.[1]

The United States is also the largest dried plum producer in the world. Its 2002/03 dried plum crop is forecast at 124,276 tons, a 3-percent increase from the previous year. The industry is beset with large inventories of previous years, but a $17 million Pull Out Program initiated in the beginning 2002 appears to be stabilizing production levels.

[1] Global Trade Atlas

U.S. dried plum imports were minimal in 2001, totaling $671,000. Taiwan, China, Argentina, Chile, and Turkey were the major foreign suppliers. No increases in imports are expected.



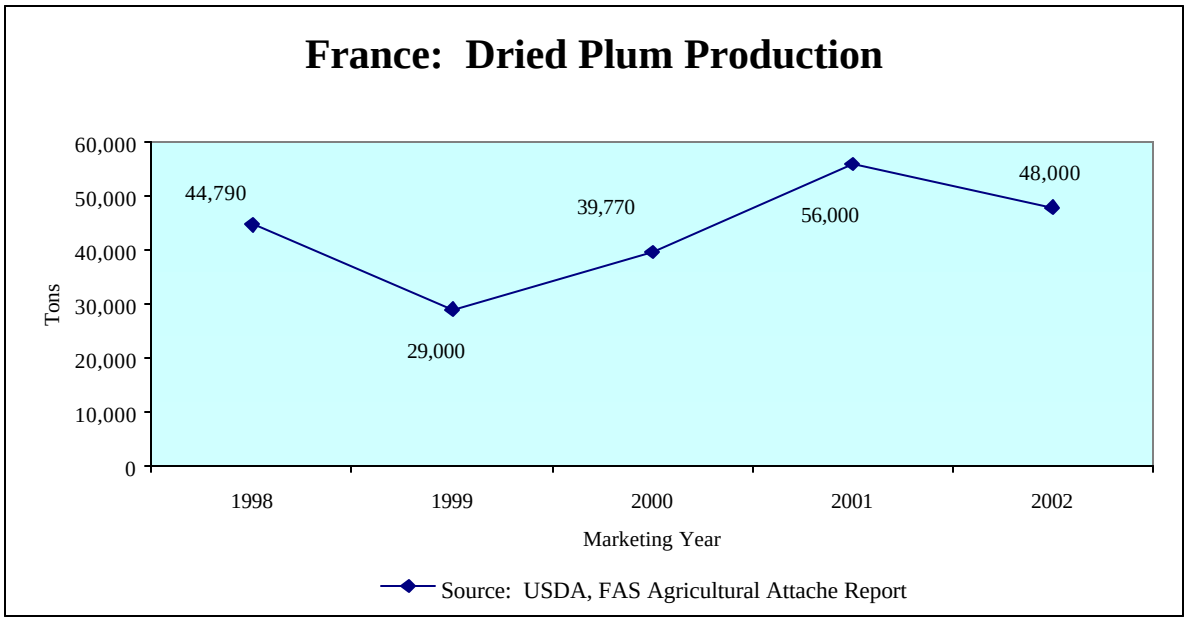
The California Prune Board (CPB) received $1,838,400 in Market Access Program (MAP) funding for marketing activities in China, Germany, Japan, Italy, Spain, India, and the U.K. Branded activities will continue in the Western European markets. Both generic and branded activities will focus on consumers to pull the products through the channels of distribution. The CPB's main strategy is to educate the trade sector on the nutritional attributes of California prunes and to position the product as a healthful, low-fat, and convenient snack and as a versatile cooking ingredient. With the anticipated increase in California prune supplies, the CPB will continue to investigate developmental markets with a total of $35,000 in Emerging Market funds for research in Korea and Russia.

France

France is the second largest producer and exporter of dried plums in the world. French prune production for 2002/03 is forecast to decrease to 45,000 tons from 48,000 tons as a result of unfavorable weather conditions. Despite the decline, production levels during the past 2 years are returning to normal levels after several years of underproduction.

French dried plum exports in CY 2001 were valued at more than $29 million. Between 1999 and 2001, its total exports averaged nearly $31 million. France's top export markets were the U.K., Germany, Algeria, Belgium, and Italy. Collectively, these five markets comprised of 55 percent of France's dried plum exports.

In 2001, France's dried plum imports totaled more than $3.8 million. Chile and Argentina combined, made up 64 percent of the dried plum import market. Italy, Germany, and Yugoslavia rounded out the top foreign sources for dried plums.



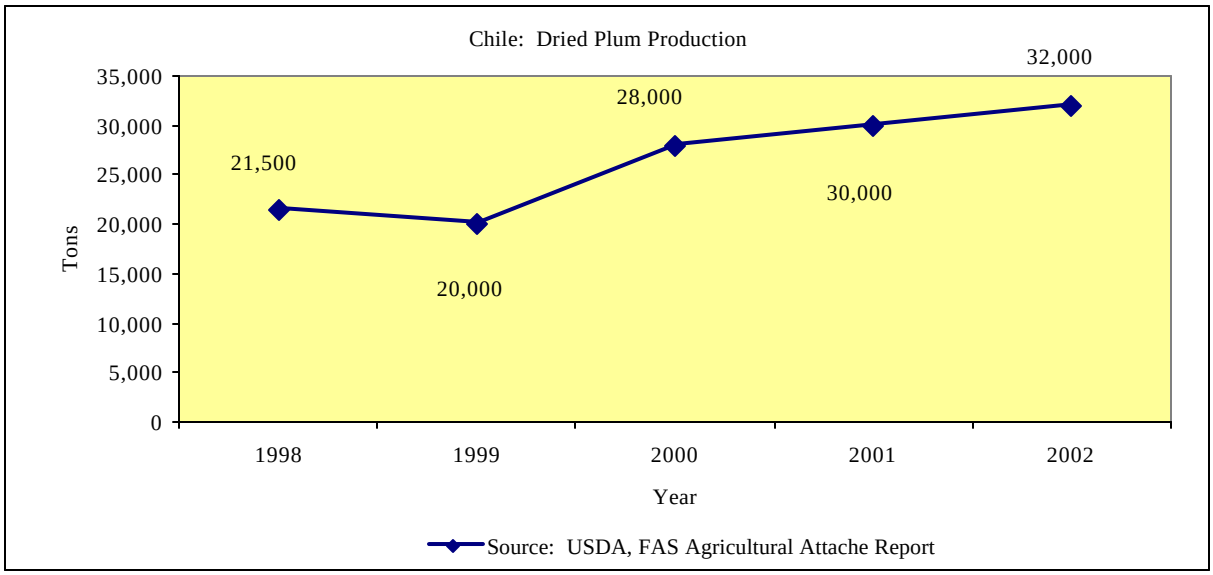
Chile

Chile is the third leading exporter of dried plums in the world. In 2001, its dried plum exports were valued at more than $32 million. Between 1999 and 2001, Chile's total exports averaged over $31 million. Mexico was its top export market in 2001 with imports valued at over $10 million - 32 percent of Chile's dried plum exports. Germany, Brazil, Venezuela and Spain were also leading export markets.[2]

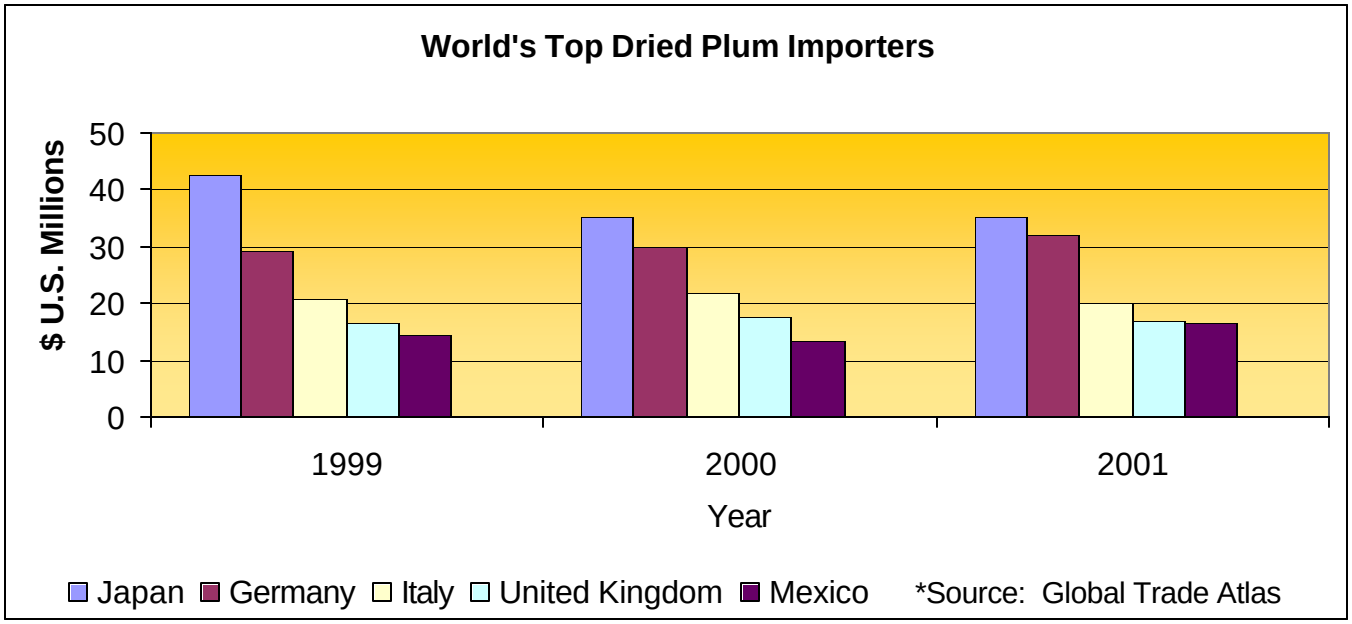
Significant increases in planted area and favorable weather conditions are expected to increase dried plum supplies. Orchards planted in CY 1996 and 1997 are beginning to bear fruit and are likely to increase production for the next 3 to 4 years. In MY 2002, production is forecast at 32,000 tons, a 6-percent increase from the previous year.

Chile's dried plum imports totaled $19,000 in 2001, 75 percent originating from Mexico. The 7-percent tariff charged on imported goods is expected to fall to 6 percent in 2003. In addition, an 18-percent value-added tax is charged on all consumer items, both domestic and imported.

[2] Global Trade Atlas



World dried plum imports totaled more than $223 million in 2001. The top dried plum importing countries were Japan, Germany, Italy, the U.K., and Mexico. Japan imported a total of $35.2 million; Germany $31.9 million; Italy, $20.1 million; the U.K. $16.9 million; and Mexico $16.4 million. These five countries imported 54 percent of the world's dried plum trade in 2001.



(The FAS Attaché Report search engine contains reports on leading dried fruit producing countries, including South Africa, Turkey and Australia. For information on production and trade, contact Rey Santella at 202-720-0897. For information on marketing contact Krista Dickson at 202-720-5330)

Raisin Situation and Outlook in Selected Countries

In 2002/03, raisin production in selected producing countries is forecast to decline by 1 percent to 720,200 tons. Unfavorable weather conditions are likely to affect crop supplies in Turkey and Greece, while raisin production in Mexico and the United States is projected to be the same as last year. In the southern hemisphere, favorable weather conditions and increased planting areas in Australia, Chile, and South Africa are expected to return raisin crops to normal levels.

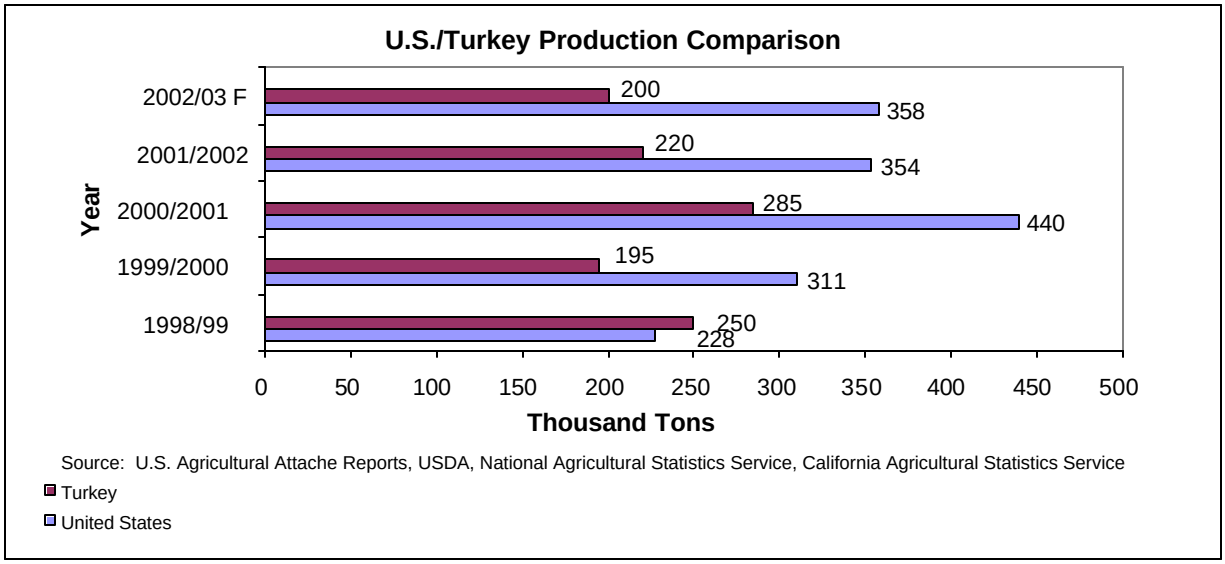
Turkey

Turkey is the second largest producer of raisins in the world behind the United States. In 2002/03, its raisin production is forecast to fall between 10 and 14 percent from last year as a result of heavy rainfall during the harvest season.

Turkey is the top raisin exporter in the world, with exports valued at more than $161 million in CY 2001. Between 1999 and 2001, its total exports averaged nearly $187 million. Turkey's top export markets were the U.K., Germany, the Netherlands, Italy, and Australia. Collectively, these five markets comprised 69 percent of the country's raisin exports.

Prices were lower early in the growing season (approximately $US 650 per ton of standard 9), but were raised after the rains. Currently, the price of a standard #9 bulk is about $800 per ton and for standard #10 bulk is about $850 per ton. No. 9s and No. 10s generally make up a sizable proportion of the crop and are the first buying choice of many traders.[1]

Raisin export opportunities to Turkey are minimal. In CY 2001, imports totaled $1.3 million. Greece was the largest supplier of raisins accounting for nearly 50 percent of all imports. The U.S. shipped $311,000 worth of raisins in CY 2001, making it Turkey's second largest supplier of imported raisins. Raisin imports are unlikely to increase given the high duty on imported raisins, which is currently at 56.1 percent.



United States

The United States is a leading world exporter of raisins, second only to Turkey. In CY 2001, U.S. raisin exports totaled over $145 million. Between 1999 and 2001, its total exports averaged over $162 million. The United States' largest export markets were the U.K., Canada, Japan, Germany, and Sweden. Collectively, these 5 markets comprised nearly 64 percent of its raisin exports.[2] On average, about 33 percent of the U.S. raisin crop is exported.

The United States is the largest raisin producer in the world. The forecast for 2002/03 raisin production is at 358,000 tons, an increase of 1 percent. Since 1999, the industry has been beset with surplus production and stagnant domestic demand resulting in large stock inventories. To address the problem, the industry implemented a raisin diversion program (RDP) for the 2002 crop. The RDP curtails production by vine removal, trimming or some other means approved by the Raisin Administrative Committee (RAC), the entity responsible for administrating the Federal Marketing Order. The RDP for the 2002/03 crop has not been established. An estimated 43,000 tons was diverted through the RDP in 2002/03.

Raisin imports totaled more than $12 million in CY 2001. Chile, Mexico, Argentina, South Africa and Iran were the top five foreign suppliers of raisins.

The Raisin Administrative Committee (RAC) received $2,043,943 in Market Access Program (MAP) funding to continue marketing activities in 7 countries in Southeast Asia and the U. K. in 2002. RAC's main strategy is to convince the trade sector of the value-added qualities of raisins. In certain countries RAC adds a strategy targeting the consumer focusing on the quality, nutrition, and usage of California raisins. The RAC also received a total of $216,500 in Emerging Market funds for China and Estonia to assist in capitalizing on perceived opportunities in the confectionary and baking industries. Most recently, the RAC received $50,000 under the Technical Assistance for Specialty Crops (TASC) program to overcome barriers to trade in the Japanese market.

[1] USDA FAS Attaché Report #TU2044 & FoodNews, October 11, 2002

Greece

Greece is the third largest exporter of raisins behind Turkey and the United States. CY 2001, Greece's raisin exports totaled over $39 million. Between 1999 and 2001, its total exports averaged over $70 million. Increased competition in European markets from Turkish raisin exports led the decline in trade. Greece's largest export markets were the U.K., Germany, the Netherlands, Poland, and Australia. Collectively, these five markets comprised nearly 85 percent of its raisin exports.[3] On average, 80 percent of Greece's raisin crop is exported.

Disastrous rainstorms are likely to have a dramatic impact on raisin production. Some estimates indicate that between 31 and 67 percent of the 2002/03 raisin crop could be lost. As a result of the smaller crops, exports, which have already been affected by competition from Turkey, are expected to decline even further. Despite the production shortfall, Greece is expected to supply export markets with raisin inventories collected from previous years.

Farmers are expected to request compensation from the government as result of the devastating weather conditions. Raisin imports are minimal; however, the expected production shortfall could provide an opportunity for exporters. In 2001, raisin imports totaled $2.3 million

Chile

Raisin production for MY 2002, which begins in January 2003, is forecast to be at 42,000 tons, the same level as the previous year. Raisin supplies could increase significantly in the future if discarded table grapes from new vineyards are diverted to raisin production. More than 90 percent of Chile's raisin production is exported.

Chile is the fourth largest raisin exporter in the world. In 2001, Chile's raisin exports totaled more than $35 million. Mexico, the United States, Colombia, Peru, and Brazil were its top export markets. These five markets comprised 62 percent of all exports in 2001. Between 1999 and 2001, its raisin exports averaged $43 million.

Chile's raisin imports totaled $19,000 in 2001, 75 percent originating from Mexico. The 7-percent import tariff is expected to fall to 6 percent in 2003. In addition, an 18-percent value-added tax is charged on all consumer items, both domestic and imported.

South Africa

South Africa is the world's fifth largest exporter of raisins. In 2001, raisin exports were valued at more than $20 million. The devaluation of the rand is anticipated to help boost exports despite the glut of quality raisins on the international market. Canada, Germany, the Netherlands, France and the U.K. are its top export markets. These five markets comprised 73 percent of all exports in 2001. Raisin imports are minimal. Favorable weather conditions are expected to

[2] Global Trade Atlas
[3] Global Trade Atlas

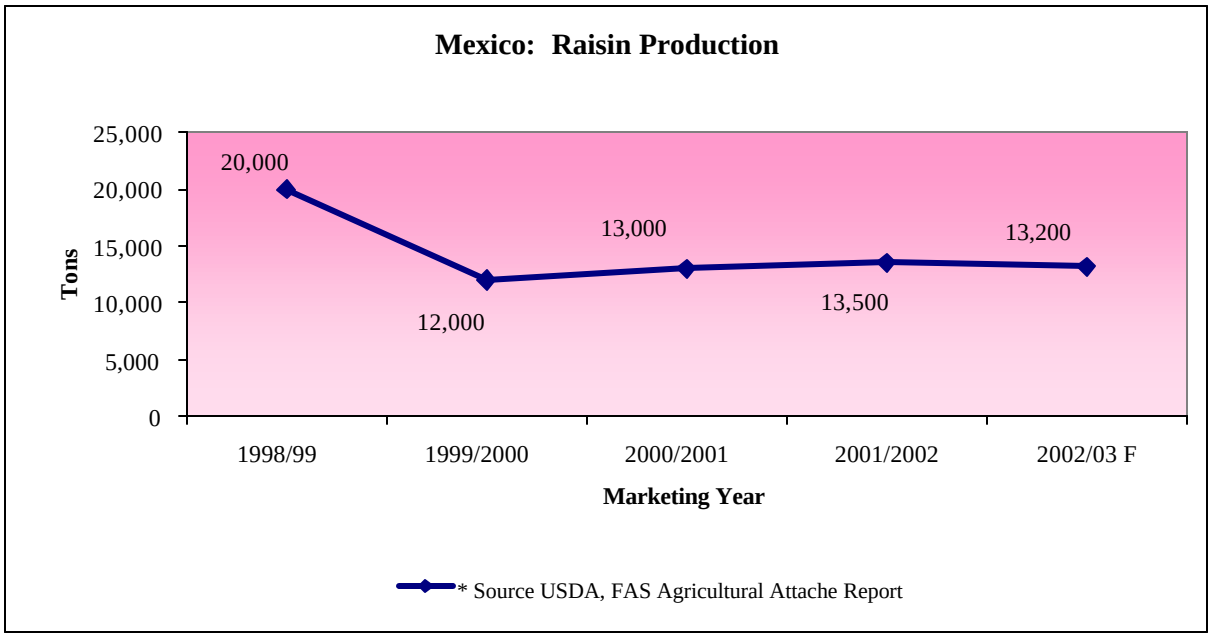
maintain raisin production at normal levels in MY 2003, which begins in January 2003. The MY 2002 crop of 42,355 tons, was the largest crop since MY 1997.

Mexico

Mexico exported a little more than $4 million worth of raisins in 2001, with nearly 92 percent of the export volume going to the United States. Guatemala, Honduras, Chile, and Colombia rounded out its top five export markets.

Production for 2002/03 is expected to remain in line with forecasts made in the earlier part of the year at 13,200 tons. Mexico's current economic woes could affect crop production in the future as continued problems with low prices, lack of available credit, and diversion of raisins for the wine and juice markets are decreasing planted areas and driving farmers out of business.

Opportunities for imports to Mexico do exist, albeit for lower priced raisins. Chile remains the dominant supplier to Mexico accounting for approximately 80 percent of the country's raisin imports. The United States was the second largest supplier, shipping $1.8 million worth of raisins. Under the North American Free Trade Agreement (NAFTA), both Mexico and the United States allow raisins to enter their borders duty-free. Raisins from Chile also enter Mexico duty-free.



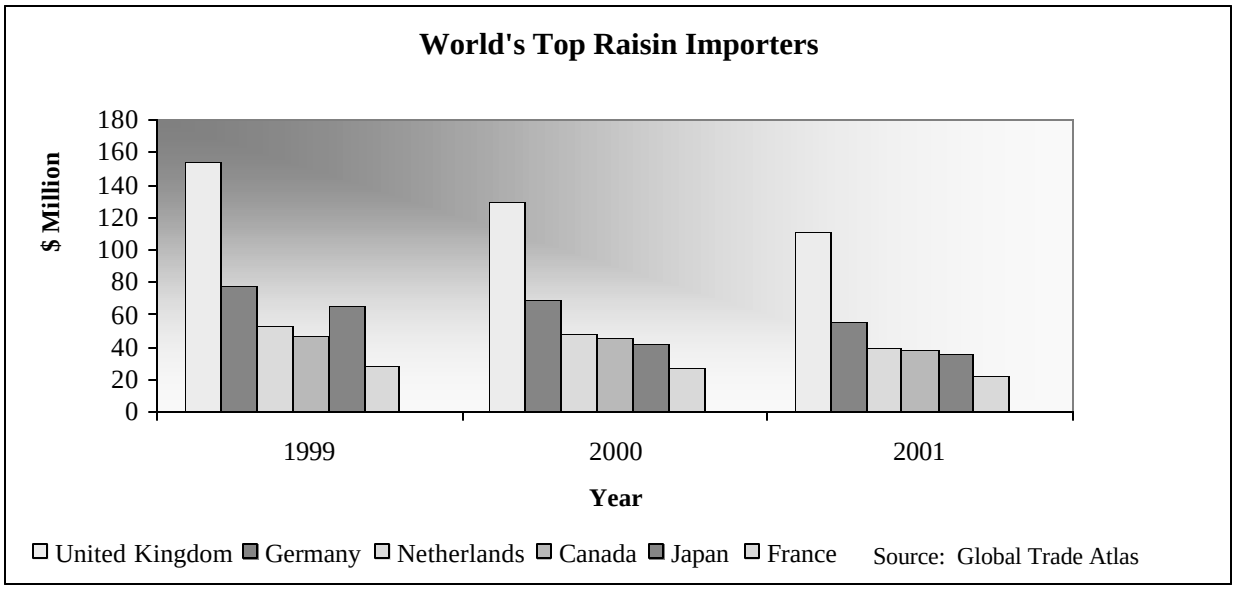
Australia

Production forecast for MY 2002, which begins in March 2003, is estimated at 36,000 tons. Favorable weather conditions and reduction in wine grape prices are expected to return raisin production to normal levels after several years of underproduction. Sultanas account for about 90 percent of Australia's raisin production.

Australia exported more than $7 million of raisins in 2001. Canada, Germany, the U.K., New Zealand, and Japan comprised 87 percent of its exports in 2001.

Australia's raisin imports were valued at over $16 million in 2001. Turkey dominated the market, supplying nearly 65 percent of Australia's raisin imports. Greece, the United States, Iran and Chile were also major foreign raisin suppliers.

Horticultural Australia Ltd. (HAL) replaces the Horticultural Research and Development Corporation and the Australian Horticultural Corporation to become the sole entity responsible for research and development and promotional activities. Growers will continue to pay a levy (A$18 per ton) to fund HAL activities.



World raisin imports totaled more than $511 million in 2001. The top raisin importing countries were the U.K., the Netherlands, Canada, Japan, and France. The U.K. imported a total of $110.6 million; Germany $56.1 million; Canada $38.1 million; the Netherlands $40.1 million; Japan $36 million; and France $22.1 million. These six countries imported 59 percent of the world's raisin trade in 2001.

(The FAS Attaché Report search engine contains reports on the leading dried fruit producing countries, including Australia, Chile, and South Africa. For information on production and trade, contact Rey Santella at 202-720-0897. For information on marketing contact Kristin Kezar at 202-690-0556.)

Strawberry Situation and Outlook in Selected Countries

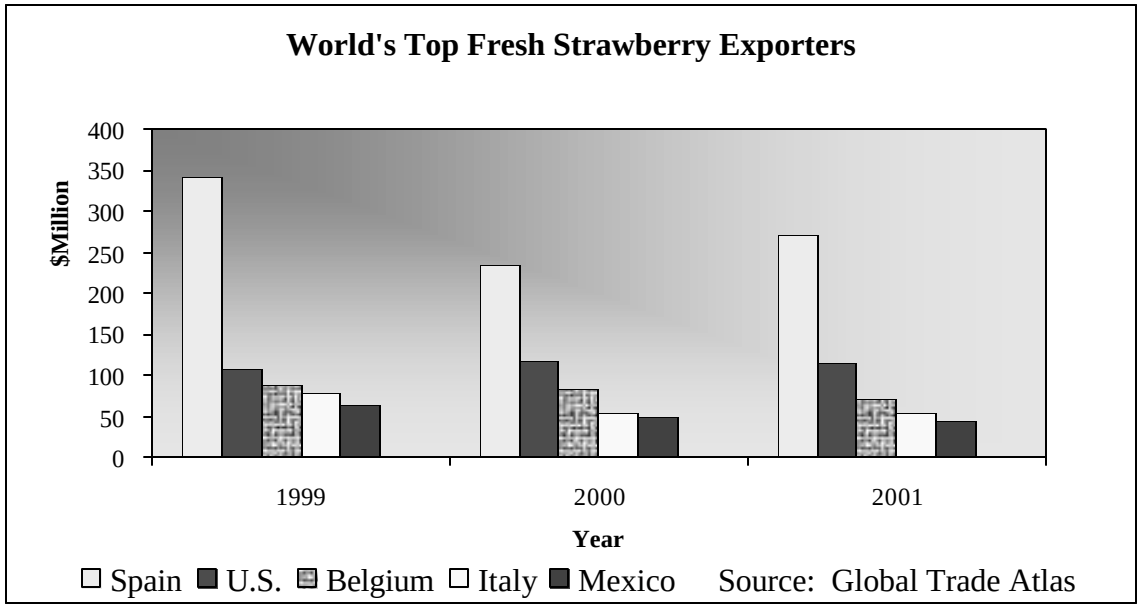
Fresh strawberry production in major strawberry-producing countries is forecast to decline by 2 percent in Marketing Year (MY) 2002. The United States, Spain, and Mexico estimate strawberry production to increase from 1 to 2 percent for the next marketing year. Italy, Japan, and Poland forecast a decline in production for MY 2003 due in large part to less acreage planted.

Spain–Fresh Strawberries

Spain is the top fresh strawberry exporter in the world in terms of value. In calendar year (CY) 2001, Spain exported more than $272 million of fresh strawberries. Between 1999 and 2001, its total exports averaged nearly $283 million. Spain's largest export markets were Germany, France, the U.K., Belgium-Luxembourg and Italy. Collectively, these 5 markets comprised of 84 percent of the country's international fresh strawberry shipments.

In 2002, Spain's strawberry production fell 9 percent from the previous year to 301,000 tons. A reduction in planted area was the primary cause for the decline. Production in 2003 is expected to rebound from this year, increasing to 310,000 tons.

Spain's imports of fresh strawberries are minimal. Its large strawberry supplies and transportation issues make market conditions unfavorable for U.S. exports.



United States

Estimates for the 2002 crop are up 1 percent compared to a year ago to 764,000 tons. The strawberry forecast for 2003 will be available in April on our strawberry commodity page which is located at the following address:
http://www.fas.usda.gov/horticulture/strawberry.html

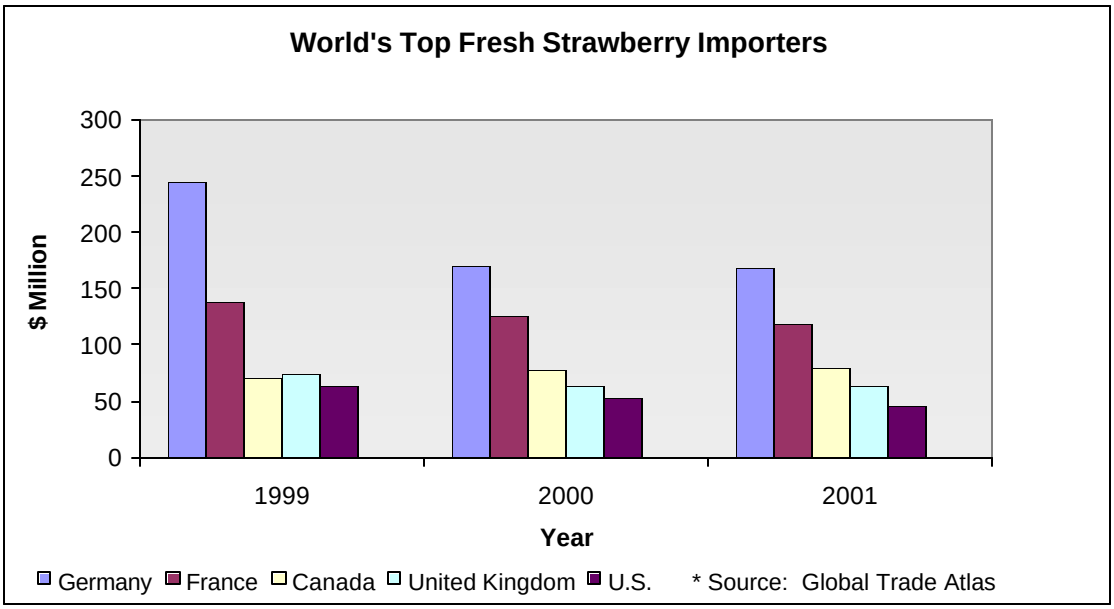
The United States is a large exporter of fresh strawberries, second only to Spain. In CY 2001, the United States exported more than $114 million dollars of fresh strawberries. Between 1999 and 2001, its total exports averaged over $113 million. The United States top five export markets were Canada, Japan, Mexico, France, and the United Kingdom. Collectively, these five countries imported 99 percent of the United States' fresh strawberry exports.

In CY 2001, the United States was the fifth largest importer of fresh strawberries, bringing in more than $45 million from foreign suppliers. Its largest foreign source of fresh strawberries was Mexico, which supplied 95 percent of all imports. New Zealand, Australia, Belgium and Canada rounded out the top five strawberry exporters to the United States

International Marketing Activities

For the 2002-03 marketing year, the California Strawberry Commission (CSC) is carrying out MAP activities for fresh strawberries in Mexico, Hong Kong, and Canada, and fresh and frozen strawberries in Japan. Research is also being carried out for California Strawberries for the first time in both China and Brazil. CSC=s main goal overseas is to broaden trade and consumer use of California strawberries by differentiation of the California strawberry. The main messages for consumers are origin, safety, health attributes, and new uses, while the focus for the trade is on improving care and handling practices as well as communicating the advantages of California strawberries versus the competition=s product.

The CSC has succeeded in Japan in particular, establishing a new image for the California Strawberry in Japan by differentiating its less sweet and firmer characteristics. Japanese consumers are now using the California berry in everything from salads to breakfast to non-traditional desserts. Retailers, intrigued with the Commission's new approach, are incorporating into demonstrations these practical but innovative ways to use California strawberries into their sales activities with great success. For the year 2002 retail sales in Japan from March to July increased by 1,000 percent.



Italy–Fresh Strawberries

Italy was the fourth largest fresh strawberry exporter in the world in CY 2001. During this period, Italy exported more than $54 million of fresh strawberries. Between 1999 and 2001, its fresh strawberry exports averaged over $62 million. Italy's top five export markets were Germany, Switzerland, Austria, Denmark, and the United Kingdom. Collectively, these five countries purchased 91 percent of Italy's fresh strawberry exports.

Italy's strawberry crop continues to decline, due to high labor costs and international competition. In 2002, Italy's strawberry production totaled 99,700 tons, a decrease of nearly 2 percent from the previous year. In 2003, strawberry production is forecast to continue the downward trend, falling to 97,000 tons.

Fresh strawberry imports rose to 24,000 tons from 22,750 in CY 2001. Imports are expected to continue to increase as the fresh strawberry crop declines. In CY 2003, imports are forecast at 26,000 tons.

Mexico–Fresh Strawberries

In CY 2001, Mexico was the fourth largest fresh strawberry exporter in the world. During this period, Mexico exported more than $44 million of fresh strawberries, with the United States as its top market. Mexico shipped over $43 million to the United States in CY 2001, comprising 97 percent of its total exports during this period. Between 1999 and 2001, its fresh strawberry exports averaged over $53 million. Rounding out its top five export markets were Japan, Italy, France, and Canada.

Mexico's current economic woes could affect the acreage planted in the future as continued problems with low prices and lack of available credit drive up costs of production. In MY 2001, which began in August, Mexico's fresh strawberry production

totaled 130,000 tons, an increase of nearly 5 percent from the previous year. In MY 2002, fresh strawberry production is forecast to rise marginally to 131,000 tons.

Imports of fresh strawberries remain steady as production remained at current levels. In MY 2001, imports were at 10,700 tons compared to 10,627 tons the previous year. In MY 2002, imports are forecast at 10,900 tons.

Poland-Fresh Strawberries

Approximately 40 percent of Poland's strawberry crop is utilized for fresh strawberry production. The remaining crop is used primarily for the production of frozen or processed strawberries. In CY 2002, total production is estimated at 162,000 tons, a 33-percent decrease from the previous year. Unfavorable weather and a decline in planting area were the primary causes for the decrease. No new plantings are expected for the upcoming year. Thus, the production forecast for CY 2003 will remain close to current levels at 160,000 tons.

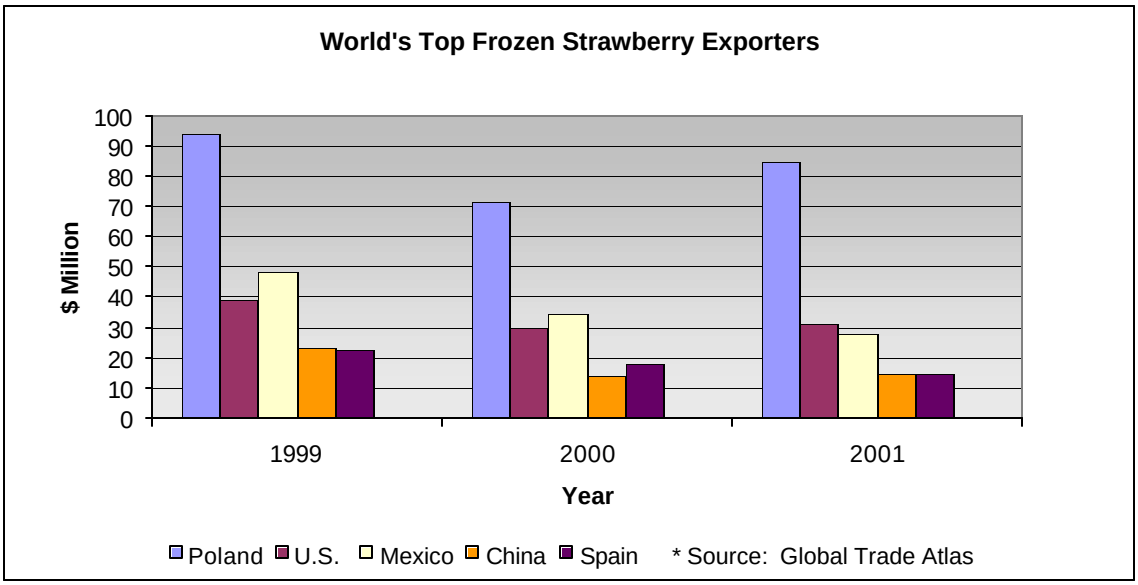
Exports in CY 2002 fell as a result of the smaller crop. In CY 2001, fresh strawberry exports decreased to 15,300 tons from 20,900. Exports are forecast near current levels at 15,000 tons for MY 2002. Imports are relatively small, totaling 1,400 tons in CY 2002. No change is expected for MY 2002.

Japan-Fresh Strawberries

Japan consumes nearly all of its strawberry production. Imports make up the shortfall in consumer demand. In MY 2001, which begins in October production totaled 208,600 tons, an approximate 2-percent increase from MY 2000. Production in MY 2002 is forecast at 205,000 tons.

Japan did not export any strawberries in MY 2000 and MY 2001. This trend is expected to continue in MY 2002.

Imports of fresh strawberries are relatively modest. In MY 2001, imports totaled 4,765 tons, a dropped of nearly 16 percent, due to the increase in the strawberry crop. Imports in MY 2002 are forecast to increase slightly to 5,000 tons.



Poland-Frozen Strawberries

On the average, 60 percent of Poland's strawberry crop is utilized for frozen strawberry production. The remaining crop is used for fresh strawberry operations. Poland exported over $84 million in CY 2001, making it the top frozen strawberry exporter in the world. Between 1999 and 2001, Poland exported an average of $83 million worth of frozen strawberries. Poland's top export markets were Germany, the Netherlands, France, Denmark and the United Kingdom. Collectively, these five markets comprised of 73 percent of the Poland's international frozen strawberry shipments.

Poland's imports of frozen strawberries CY 2002 were relatively small. In CY 2002, imports were estimated to reach 1000 tons, 50 percent higher than the previous year. Imports for CY 2003, are expected to remain the same as CY 2002

China-Frozen Strawberries

In CY 2001, China exported more than $14 million of frozen strawberries making it the fourth largest exporter in the world. Between 1999 and 2001, China averaged $17 million in frozen strawberry exports. China's largest export markets were Japan, the Netherlands, Australia, Germany, and the United Kingdom. These top five countries combined to make up 80 percent of China's frozen strawberries export markets in CY 2001.

Although China's Ministry of Agriculture does not regularly issue public reports, local published sources estimate that the country's annual production is over 120,000 tons on an approximate acreage of 20,000 to 30,000 hectares. Until the 1990s, strawberry production was limited. The popularity of the fruit has increased as the utilization of plastic covered tunnel greenhouses allowed for the year-round production of the fruit, particularly during the winter months. Aside from a flexible growing period, start-up

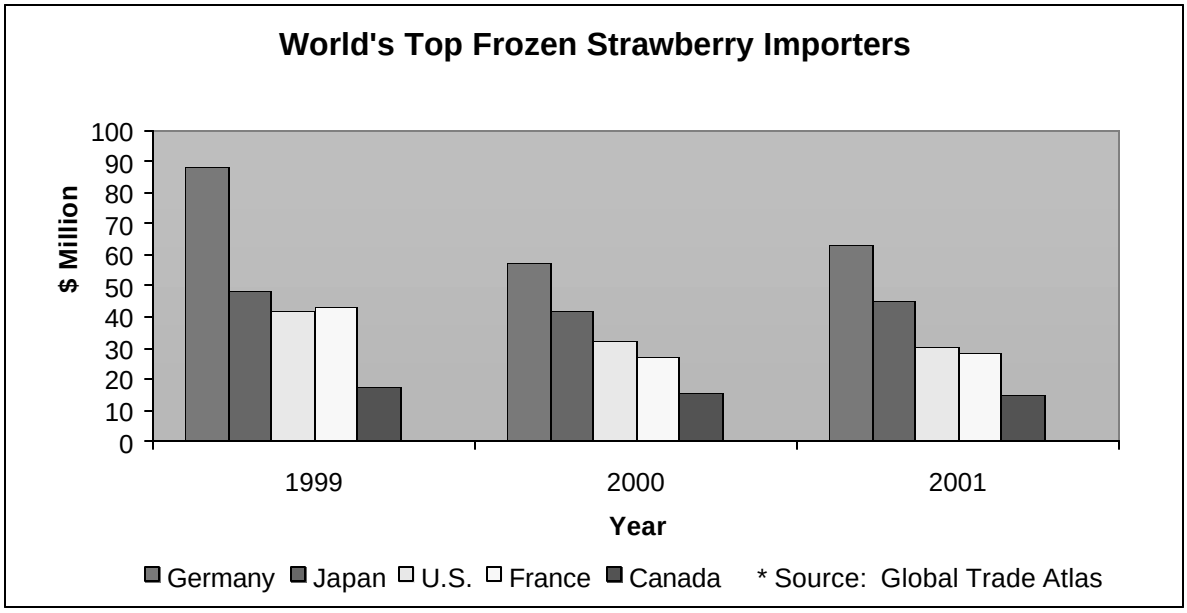
investment is low relative to other fruits and the return on investment is relatively quick. A majority of the strawberries in China are harvested between early March and early June. Imports of frozen strawberries are minimal. China's Customs Statistics estimate CY 2001 imports at $817,000. [1]

United States-Frozen Strawberries

The United States is a leading frozen strawberry exporter in the world, second only to Poland. In CY 2001, the United States exported more than $31 million of frozen strawberries. Between 1999 and 2001, its total frozen strawberry exports averaged over $33 million. Japan, Canada, Australia, South Korea and France were the largest frozen export markets in CY 2001. Collectively, these five markets comprised 98 percent of its frozen strawberry exports.

On the average, twenty-five percent of the U.S. strawberry crop is used for frozen and/or processing production.

In 2001, the United States was the third largest importer of frozen strawberries bringing in more than $30 million from foreign sources. The United States five largest frozen strawberry suppliers were Mexico, Canada, Ecuador, Guatemala, and China. Between 1999 and 2001, U.S. frozen strawberry imports averaged $34 million.



[1] Foreign Agricultural Service Gain Report #CH2616, China's Strawberry Situation 2002.

Mexico-Frozen Strawberries

Mexico is the third largest frozen strawberry exporter in the world, behind Poland and the United States. In CY 2001, Mexico exported more than $31 million of frozen strawberries. Between 1999 and 2001, its total frozen strawberry exports averaged over $36 million. The United States, Japan, Canada, Australia, and Austria were its largest export markets. Collectively, these five markets comprised 99 percent of its international frozen strawberry sales.

Mexico's current economic woes could affect the acreage planted in the future as continuing problems with low prices and lack of available credit drive up costs of production. In MY 2001, which began in August, Mexico's frozen strawberry production totaled 130,000 tons, an increase of nearly 5 percent from the previous year. In MY 2002, frozen strawberry production is forecast at 131,000 tons.

Imports of frozen strawberries are quite small with exports reaching only 265 tons in MY 2001. A slight increase is expected in MY 2002.

Spain-Frozen Strawberries

Spain is the fifth largest frozen strawberry exporter in the world. In CY 2001, Spain exported more than $14 million of frozen strawberries. Between 1999 and 2001, its total frozen strawberry exports averaged over $18 million. The Netherlands, Germany, France, Italy and Belgium-Luxembourg were the top frozen export markets in CY 2001. Collectively, these five markets comprised 72 percent of its international frozen strawberry shipments.

On the average, 15 percent of Spain's strawberry crop is used for the frozen and/or processed production.

In CY 2001, Spain's imports of frozen strawberries totaled an estimated $4.3 million. Between 1999 and 2001, Spain's frozen strawberry imports averaged about $4.5 million. Morocco, France, Germany, Belgium-Luxembourg and the Netherlands were Spain's five largest suppliers.

Japan-Frozen Strawberries

Japan did not export any strawberries in MY 2000 and MY 2001. This trend is expected to continue in MY 2002. On the average, 1 percent of Japan's strawberry crop is used for the frozen and/or processing production.

In CY 2001, Japan imported more than $45 million of frozen strawberries. Approximately 48 percent of the frozen strawberry supplies came from the United States, its largest supplier. China, South Korea, Mexico, and Chile were the top frozen strawberry suppliers to Japan.

Italy-Frozen Strawberries

Italy is among the top fifteen frozen strawberry exporters in the world. In CY 2001, it exported more than $2.1 million of frozen strawberries. Between 1999 and 2001, its frozen strawberry exports averaged over $2.8 million. France, Switzerland, the United Kingdom, Germany, and Austria were the top frozen export markets in CY 2001. Collectively, these five markets comprised 95 percent of Italy's frozen strawberry exports.

On the average, 10 percent of Italy's strawberry crop is used for the frozen and/or processing production.

In CY 2001, Italy's imports of frozen strawberries totaled an estimated $7.1 million. Between 1999 and 2001, Spain's frozen strawberry imports averaged about $8.1 million. France, Turkey, Spain, Germany, and Poland were Italy's five largest suppliers.

(The FAS Attaché Report search engine contains reports on Fresh Strawberry industries for 6 countries, including Spain, Italy, and Mexico. For information on production and trade, contact Rey Santella at 202 720-6877 or visit the strawberry commodity page at http://www.fas.usda.gov/htp/horticulture/strawberry.html For information on marketing contact Elizabeth Mello at 202-690-6057).

Canned Sweet Corn Situation and Outlook in Selected Countries

Global exports of canned sweet corn (CSC) were nearly $353 million in CY 2001, up 6 percent from CY 2000. The largest exporter of CSC, France, increased its global market share from 31 percent in 1999 to nearly 38 percent in 2001. The U.S. share of global CSC exports has declined to 35 percent from 42 percent in 1999. Thailand has increased its exports of CSC to nearly $22 million (an increase of nearly 40 percent) and increased its global market share to 6 percent in 2001. While Thailand remains an important competitor for the United States, the country is facing a supply constraint due to flooding in the production areas.

Trade

Global exports of canned sweet corn (CSC) were nearly $353 million in CY 2001, up 6 percent from CY 2000. The top five exporting countries, accounting for 88 percent of all CSC exports were: France, the United States, Thailand, Canada, and Belgium. Global imports of CSC were valued over $405 million for 2001. Japan, Germany, the United Kingdom (U.K.), South Korea and Taiwan accounted for nearly 58 percent of total CSC imports.

Canned Sweet Corn: Leading Exporters and Importers

Leading Exporters	World Share (*percent*)	Leading Importers	World Share (*percent*)
France	37.73	Japan	18.1
United States	34.79	Germany	15.9
Thailand	6.21	United Kingdom	11.9
Canada	4.85	South Korea	7.4
Belgium	4.62	Taiwan	4.7
Rest of World	11.79	Rest of World	42.1
Total	100.00		100.00

Source: World Trade Atlas

France

France surpassed the United States in 2001 to become the world's leading exporter of canned sweet corn with exports valued at $133 million. France increased its global market share from 31 percent in 1999 to nearly 38 percent in 2001. France's major markets include Germany (23.9 percent), U.K. (19.5 percent), and Spain (18.2 percent).

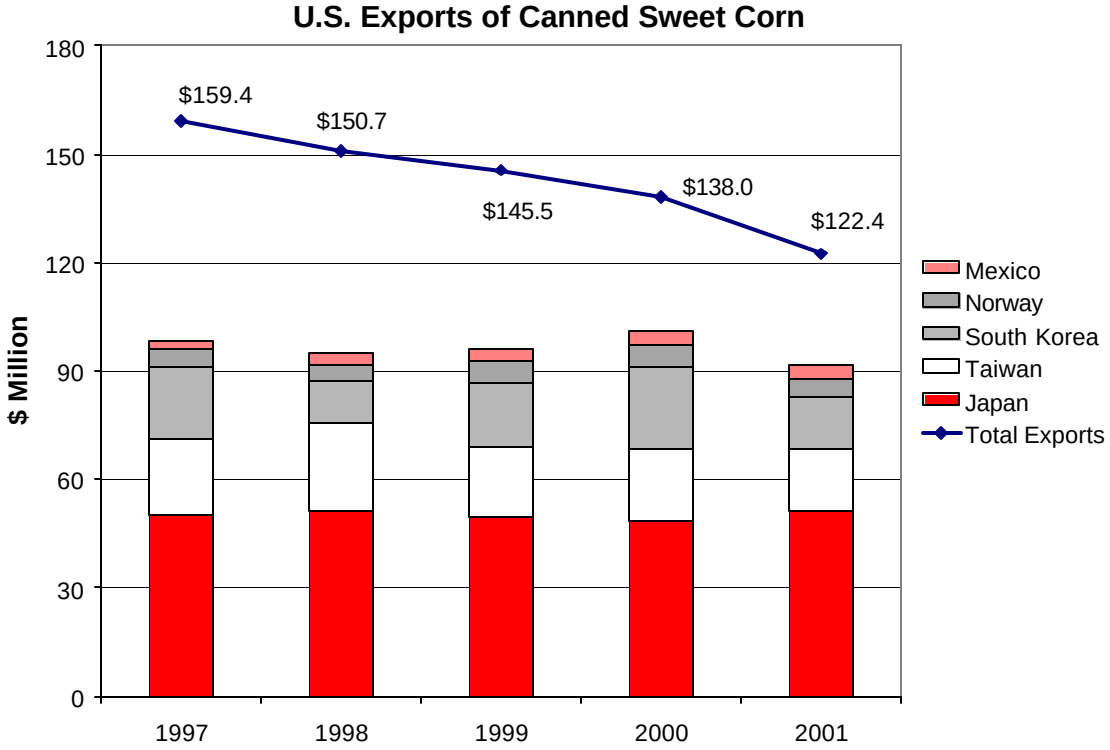
The area for sweet corn production has increased by an estimated 2,820 hectares (ha) to 28,000 ha in 2002. French production of CSC is forecast to be 272,000 metric tons for 2002, more than a 2,000-ton increase over 2001. Despite French concerns about

biotechnology issues, production of sweet corn has increased, primarily as a response to export demand.

United States

U.S. exports of CSC have declined steadily since 1997 to $122 million in 2001. The U.S. share of global CSC exports has declined to 35 percent from 42 percent in 1999. In the face of declining global market share, the top five markets for U.S. CSC have remained relatively stable, averaging $96 million from 1997 to 2001. Total U.S. exports of CSC for the first 10 months of 2002 are 1.4 percent above the same period of the prior year.

USDA's Economic Research Service forecasts 1.4 million tons available for canning in 2001. Imports of sweet corn for canning also rose to 53,000 tons up from 52,000 tons in 2000. Per capita consumption of sweet corn was 4.3 kilograms in 2000 compared to a forecast 3.8 kilograms in 2002.



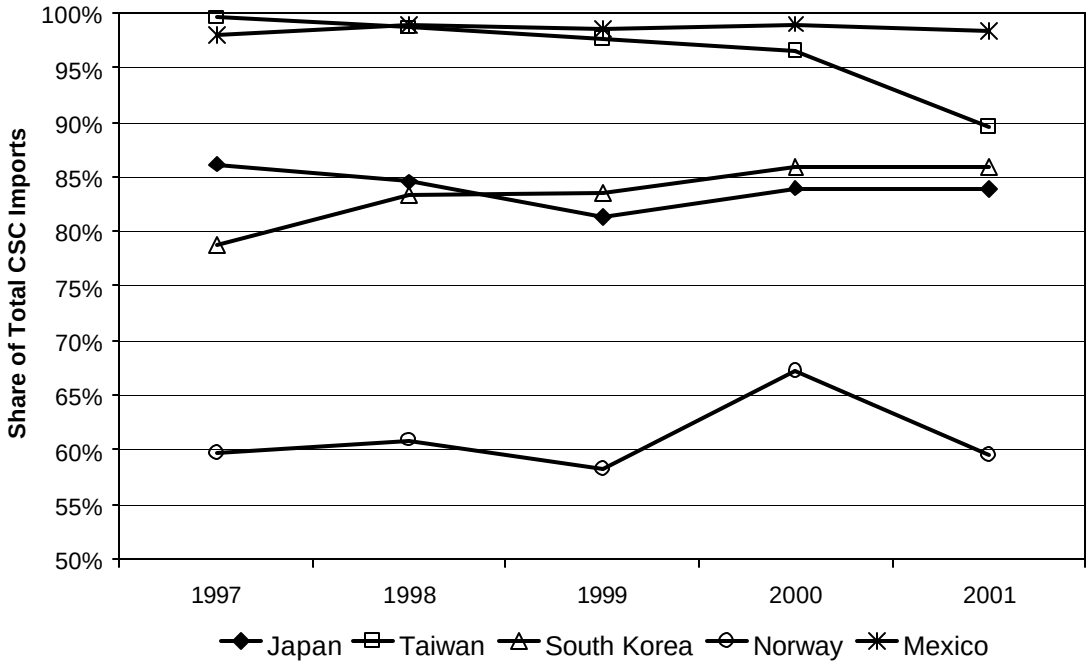
While the United States maintains a dominant share in its top five markets, it is facing increasing third-country competition. The U.S. market share in Japan has remained relatively stable; however, the emergence of China, Canada, and Thailand as important competitors may signal a new intensity in the battle for market share.

For Taiwan, the U.S. share of CSC was nearly 100 percent in 1997. By 2001, the market share had slid to just under 90 percent as result of competition from Thailand. For

January through August 2002, a decline in imports and increasing Thai competition has caused U.S. exports to drop 18 percent from this time last year.

While South Korea has two main suppliers of CSC, the United States and Thailand, the U.S. share of South Korean imports of CSC has grown since 1996 to reach 86 percent. The largest U.S. competitor for the Norwegian CSC market is Canada. Canadian market share has averaged 22 percent and is increasing. Growing imports from Thailand and France have increased the competition in this market. The U.S. is firmly entrenched as the main supplier of CSC to Mexico, accounting for an average 98 percent since 1995.

U.S. Share of Total CSC Imports for Selected Countries



Thailand

Thailand has increased its exports of CSC to nearly $22 million (an increase of nearly 40 percent) and increased its global market share from 5 percent in 1999 to 6 percent in 2001. Thai CSC exports increased 43 percent to South Korea, increased 114 percent to Taiwan, and increased 2 percent to Japan. Total exports during January to August 2002 rose over 51 percent compared to the corresponding time last year. However, Thailand is facing a fresh sweet corn supply constraint due to flooding in the production areas. This may represent a temporary opportunity for U.S. exports to recapture lost market share as exports of Thai CSC decline.

(The FAS Attaché Report engine contains reports on processed sweet corn for 4 countries, including the United States, Thailand, France, and Germany. For information on production and trade, contact Kyle Cunningham at 202-720-0875. For information on marketing contact Elizabeth Mello at 202-720-9903. For additional information on sweet corn, please visit our processed vegetables web page at: http://www.fas.usda.gov/htp/horticulture/Proc_Veg.html)

U.S. Sweet Corn for Canning

Year	Production 1/	Imports 2/	Exports 2/
	Thousand Metric tons		
1990	1521.2	21.9	319.4
1991	1755.9	19.9	323.5
1992	1671.2	18.0	368.1
1993	1325.2	17.7	427.0
1994	1923.1	23.9	366.9
1995	1548.6	22.4	400.7
1996	1563.6	9.6	437.4
1997	1494.4	13.0	477.2
1998	1506.7	21.0	462.4
1999	1584.7	28.0	455.1
2000	1544.0	29.7	432.0
2001	1376.7	43.4	361.8
2002 f	1362.6	52.2	369.1
2003 f	1496.9	53.2	376.4

Source: USDA ERS

1/ Source: National Agricultural Statistics Service, USDA. 2/ Source: Bureau of the Census, U.S. Dept. of Commerce. All product weight data was converted to a fresh weight basis using a factor of 2.463.

U.S. Horticultural Trade with Countries of the Proposed Free Trade Area of the Americas

bring their nations into full participation in the global economy.

U.S. Horticultural Trade with Countries of the Proposed FTAA

U.S. trade in horticultural products with countries in the Western Hemisphere (excluding trade with Cuba) has become a major component of the overall exchange of food and agriculture with the region. In CY 2001, horticultural products accounted for about 26 percent of total U.S. agricultural exports to the Western Hemisphere. This figure compares with 22 percent in 1995. On the other hand, about a quarter of all U.S. agricultural imports from the region in 2001 were horticultural products. On November 1, 2002, trade ministers of the 34 democracies in the Western Hemisphere met in Quito, Ecuador, to continue negotiations seeking to complete the Free Trade Area of the Americas (FTAA) by January 1, 2005. Once implemented, the FTAA would be the largest free-trade area in the world.

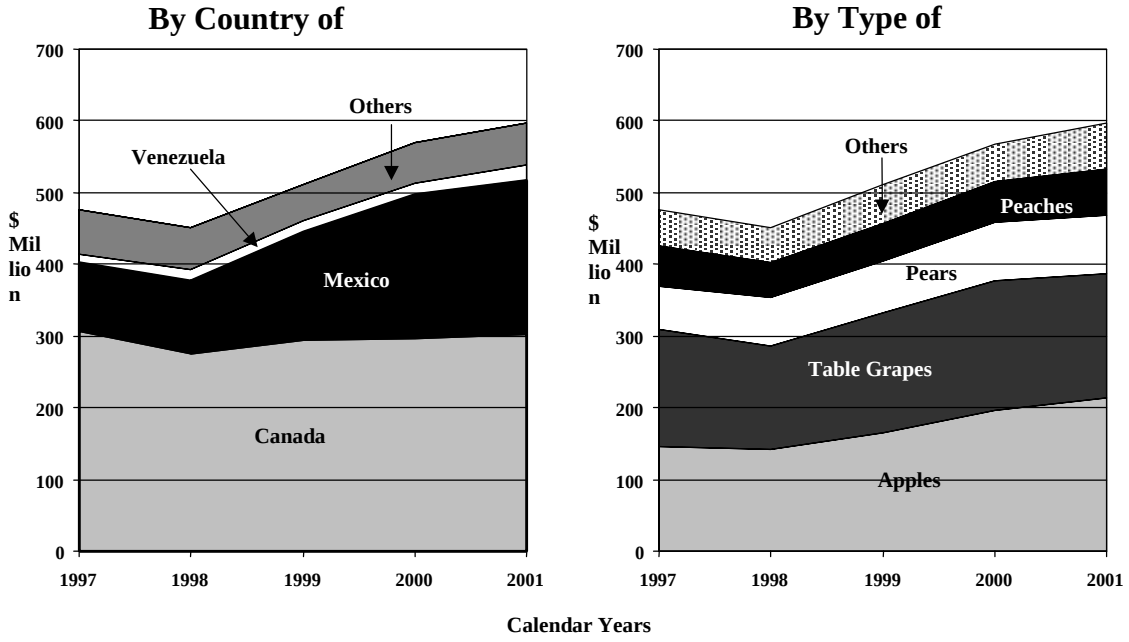
The United States has already experienced the benefits of trade liberalization with some countries in the Western Hemisphere. In 1987, the United States and Canada began eliminating import tariffs and other restrictions to trade with the creation of the U.S./Canada Free Trade Agreement. The accord was expanded in 1994 to include Mexico with the implementation of the North America Free Trade Agreement (NAFTA). Since then, trade in horticultural products between the United States, Canada, and Mexico has expanded significantly. The fruit and vegetable industries in North America, as well as its consumers, have benefited from new market opportunities offered by lower tariffs, elimination of import licenses, and the development of a more transparent business environment. It is expected that the FTAA will bring similar benefits to all Western Hemisphere countries.

U.S. Exports

U.S. exports of horticultural products to countries in the Western Hemisphere reached a record $5.1 billion in CY 2001, up 4 percent from shipments in 2000 and more than 40 percent above the valued exported 7 years ago. Following Canada and Mexico, which are already trading with the United States under liberalization, Venezuela is the major U.S. market among the proposed FTAA members. Total U.S. exports of horticultural products to Venezuela in 2001 were valued at nearly $70 million. Top U.S. horticultural products to Venezuela consist of deciduous fruits

(mainly apples and grapes), canned vegetables (mostly canned sweet corn), and juices. Other top U.S. markets in the region are Brazil, the Bahamas, and the Dominican Republic, with U.S. horticultural sales to these markets reaching $65 million, $54 million, and $50 million in 2001, respectively.

U.S. Exports of Fresh Deciduous Fruits To Countries of the Proposed FTAA



Source:U.S. Bureau of the Census

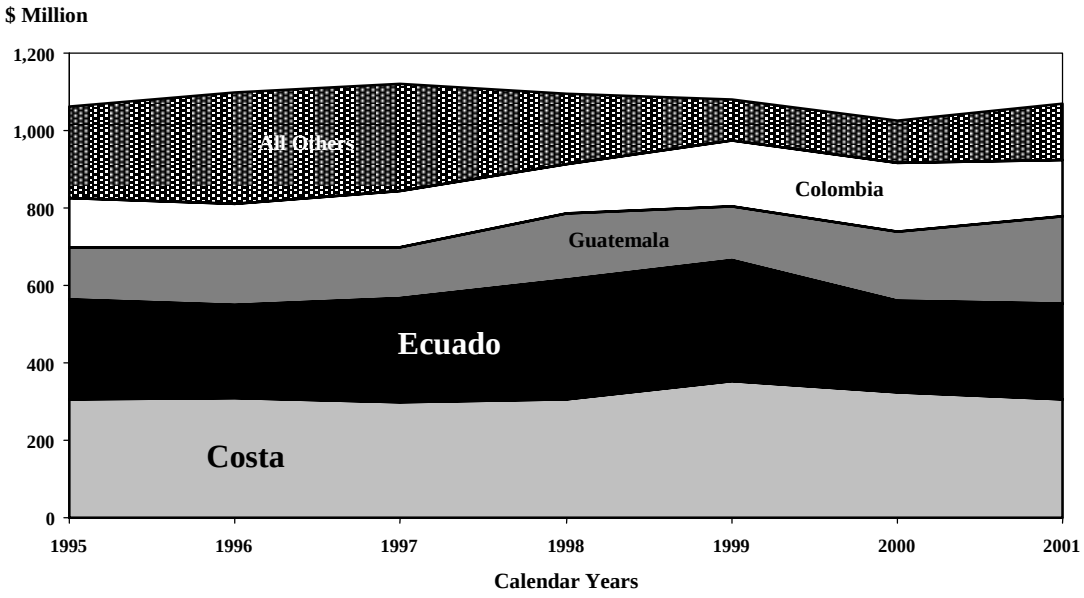
With a value of $960 million, miscellaneous fruits and vegetables accounted for just 20 percent of U.S. horticultural exports to the FTAA region. Beers, potato chips, and seasonings dominate this category group. Fresh and processed fruits and vegetables are other important horticultural products the United States exports to the area.

U.S. Imports

The value of U.S. imports of horticultural products from the proposed members of the FTAA reached a record $10 billion in 2001. Fresh vegetables and fruits account for half of U.S. imports of horticultural products from FTAA countries. The value of U.S. imports of fresh produce from the region reached $5 billion in 2001. Some major vegetables imported included tomatoes, green peppers, onions, squash, and asparagus. Major fresh fruit imports consist of bananas, table grapes, cantaloupes, pineapples, and mangoes. Costa Rica is the main supplier of bananas, followed by Ecuador and Guatemala. Chile supplies most of the table grapes to Mexico.

U.S. Imports of Bananas from Countries of the Proposed FTAA

Costa Rica Continues to Dominate the U.S. Banana Import Market



Source:U.S. Bureau of the Census

The main FTAA supplier of horticultural products to the United States is Chile, selling about $870 million of the fruits and vegetables in 2001. About 60 percent of total U.S. imports of horticultural products from Chile are deciduous fruits. In the past, these imports balance U.S. deciduous fruit demand during the spring and early summer months. However, increasing use of cold storage facilities, and the expansion of varieties of fruits with longer growing seasons is encouraging more competition between U.S. and Chilean fresh fruits.

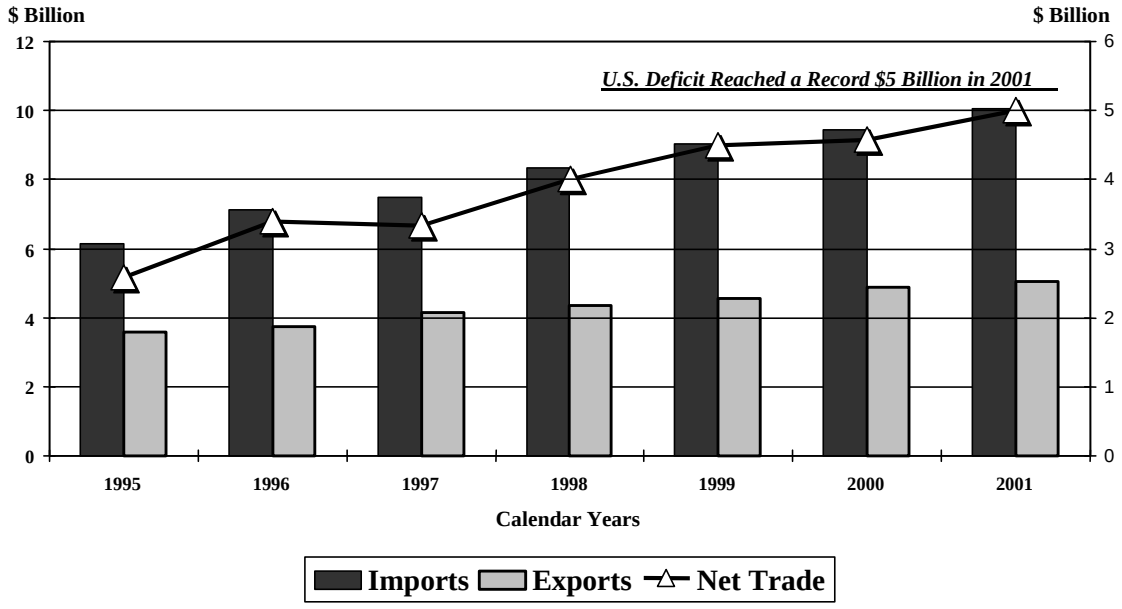
U.S./FTAA Horticultural Trade Balance

The United States runs a horticultural trade deficit with the members of the proposed FTAA. This deficit reached a record $5 billion in 2001. A stronger U.S. dollar vis-à-vis the currencies of many FTAA countries and increased consumption of fresh produce by U.S. consumers have been partially responsible for the increasing trade surplus. U.S. industry groups have also cited the implementation of unfair phytosanitary barriers as contributing to the growing trade imbalance.

The large U.S. horticultural trade deficit has raised concerns between U.S. producers and traders. Many have questions on the potential competitive advantage many Western Hemisphere countries may get from the agreement and its adverse effect on U.S. fruit and vegetable trade. Moreover, the U.S. horticultural sector is skeptical about an FTAA since there is perception that past U.S. trade agreements have not fulfilled their expectations.

Overall, U.S. tariffs on horticultural imports are the lowest in the world and, as such, domestic producers have to compete without benefit of tariff protection. On the other hand, many countries impose high tariffs and other types of trade barriers that hamper the competitiveness of U.S. horticultural sales. An FTAA that could provide meaningful and equal access to U.S. shippers will be the key for U.S. horticultural sectors' unconditional support for this or any other future trade agreement.

U.S. Horticultural Trade Balance With Proposed FTAA Countries Continues to Expand



Source: U.S. Bureau of the Census

U.S.-Chile Free Trade Agreement Near Implementation

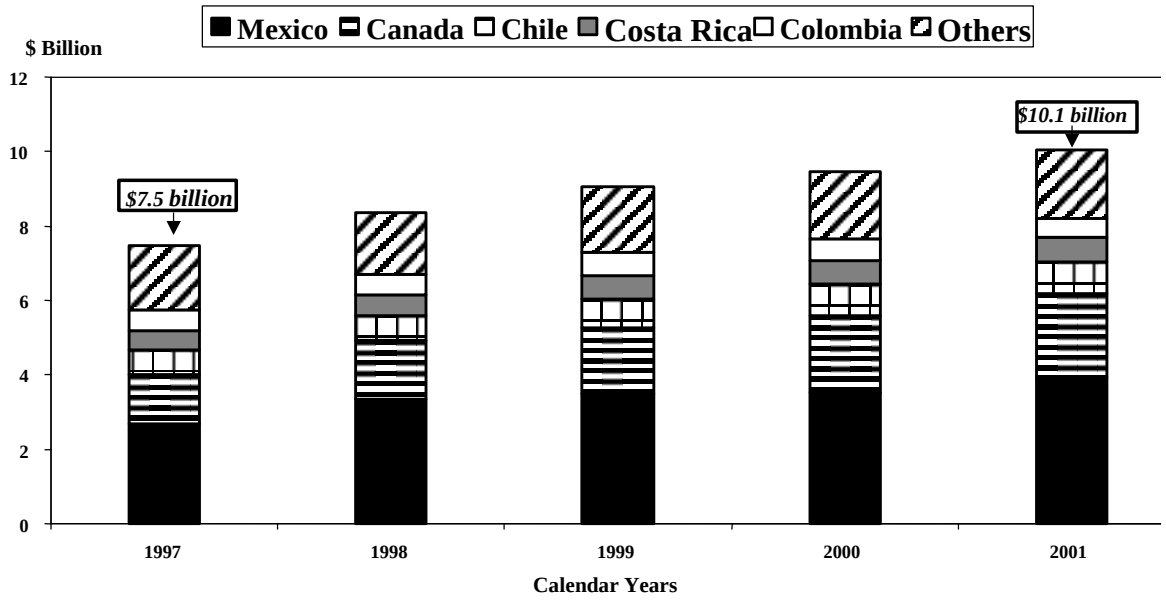
The United States and Chile have been working on the completion of a free trade agreement. The potential deal would have a direct impact in all areas of the U.S. and Chilean economies, including trade in agriculture. In recent years, shipments of horticultural products have become an important component in U.S.-Chile agricultural trade. The value of U.S. horticultural exports to Chile in 2001 reached $28 million, 50 percent more than shipments in 2000 and almost double the value exported 7 years ago. On the other hand, Chile's exports of horticultural products to the United States were valued at $860 million in 2001.

More than 60 percent of total U.S. imports of horticultural products from Chile are fruits. Chile's exports of fresh fruits to the United States in 2001 totaled about 575,000 tons, valued at

$605 million. These figures contrast with Chilean exports of 430,000 tons, valued at about $315 million in 1995.

U.S. Imports of Horticultural Products From Countries of the Proposed FTAA

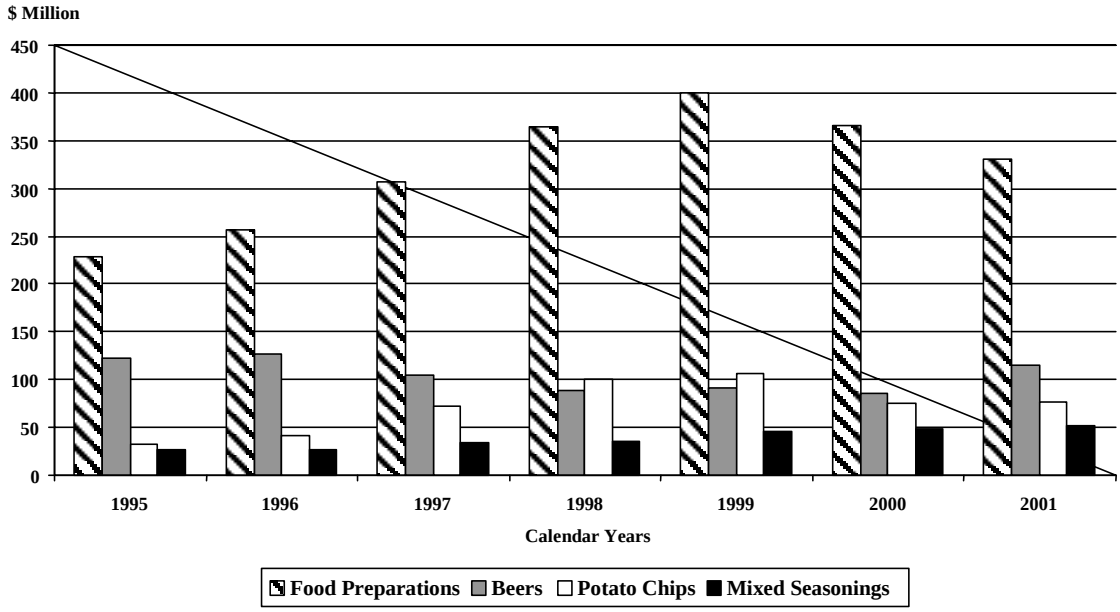
Value of U.S. Imports Have Expanded by More than $2 Billion Since 1997



Source: U.S. Bureau of the Census

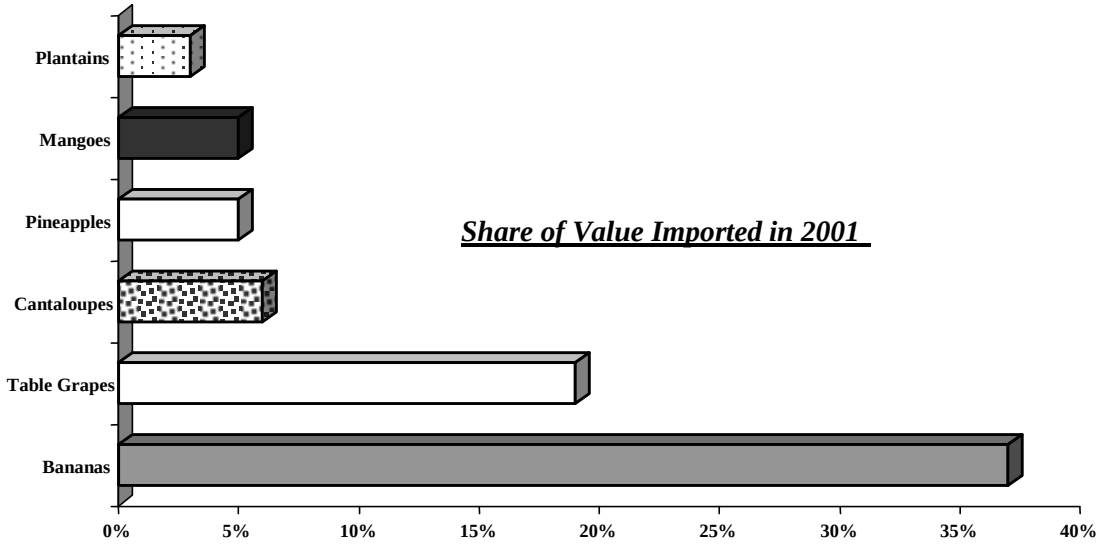
Wine imports, the second largest category, accounts for 16 percent of the value of U.S. horticultural imports from Chile in 2001, compared to 10 percent 7 years ago. The demand is driven by an upward trend on U.S. wine consumption, as well as by increased promotional efforts by Chilean wine producers and traders.

U.S. Exports of Some Miscellaneous Horticultural Products To Countries of the Proposed FTAA



Source: U.S. Bureau of the Census

U.S. Top Fresh Fruit Imports From Countries of the Proposed FTAA



Source: U.S. Bureau of the Census

U.S. EXPORTS OF HORTICULTURAL PRODUCTS
TO COUNTRIES OF THE PROPOSED FTAA
EXPORTED VALUE BY COMMODITY GROUP
($1,000 DOLLARS)
CALENDAR YEARS 1995-2001

COMMODITY GROUPS	Rank Value 2001	1995	1996	1997	1998	1999	2000	2001	2000-01 Percent Change	1995-01 Percent Change
MISCELLANEOUS FRUITS & VEGGIES 1	1	$661,022	$754,356	$844,742	$907,461	$1,046,728	$941,313	$960,121	2%	45%
FRESH VEGETABLES 2/	2	$683,688	$638,787	$736,127	$754,242	$748,724	$880,486	$892,573	1%	31%
FRESH DECIDUOUS FRUITS	3	$420,294	$433,951	$476,105	$450,716	$511,007	$567,860	$595,815	5%	42%
CANNED VEGETABLES	4	$251,367	$280,573	$304,256	$337,857	$328,013	$344,597	$379,873	10%	51%
JUICES	5	$266,995	$283,008	$311,917	$335,666	$363,880	$367,663	$363,287	-1%	36%
DRIED VEGETABLES	6	$81,659	$94,076	$134,286	$155,866	$127,307	$226,290	$277,461	23%	240%
ESSENTIAL OILS	7	$165,456	$186,425	$195,766	$201,061	$215,176	$243,208	$265,143	9%	60%
TREE NUTS	8	$129,219	$143,451	$141,953	$150,798	$168,004	$180,952	$181,162	0%	40%
OTHER FRESH FRUITS	9	$94,130	$90,860	$101,919	$107,670	$131,061	$152,903	$165,356	8%	76%
FRESH CITRUS	10	$149,183	$153,675	$161,726	$162,086	$112,853	$136,061	$144,057	6%	-3%
NURSERY PRODUCTS 3/	11	$103,007	$101,192	$116,213	$124,106	$127,967	$128,086	$129,246	1%	25%
WINE AND WINE PRODUCTS	12	$73,884	$96,088	$101,209	$116,619	$124,679	$134,477	$122,835	-9%	66%
FROZEN VEGETABLES	13	$76,962	$79,845	$92,957	$104,134	$108,203	$111,315	$122,073	10%	59%
FRESH MELONS	14	$69,313	$68,407	$71,156	$74,862	$76,938	$81,035	$84,629	4%	22%
POTATOES	15	$79,272	$79,585	$78,487	$84,349	$80,766	$82,929	$81,797	-1%	3%
DRIED FRUITS	16	$64,915	$63,027	$74,728	$67,313	$65,585	$66,179	$64,818	-2%	0%
HOPS	17	$63,332	$52,288	$55,786	$49,543	$42,505	$42,406	$53,563	26%	-15%
MISCELLANEOUS PREPARED FRUITS	18	$33,733	$33,067	$37,597	$40,509	$40,272	$47,695	$48,180	1%	43%
CANNED FRUITS	19	$35,115	$38,152	$45,544	$54,599	$59,714	$51,558	$43,946	-15%	25%
FROZEN FRUIT	20	$24,063	$28,116	$27,239	$36,100	$39,878	$40,339	$36,810	-9%	53%
CUT FLOWERS	21	$28,138	$30,767	$33,766	$34,196	$33,358	$33,410	$33,953	2%	21%
OLIVES	22	$3,946	$4,453	$4,463	$3,926	$3,936	$4,080	$3,442	-16%	-13%
GINSENG	23	$1,790	$1,711	$1,696	$1,667	$2,197	$1,536	$1,199	-22%	-33%
TOTAL		**$3,560,483**	**$3,735,861**	**$4,149,638**	**$4,355,346**	**$4,558,753**	**$4,866,378**	**$5,051,340**	**4%**	**42%**

1/ Some products included in this category are soup broths, beers, baby food, and potato chips.
2/ Does not include potatoes.
3/ Does not include cut flowers.

Source: U.S. Department of Commerce, Bureau of the Census

U.S. IMPORTS OF HORTICULTURAL PRODUCTS
FROM COUNTRIES OF THE PROPOSED FTAA
IMPORTED VALUE BY COMMODITY GROUP
($1,000 DOLLARS)
CALENDAR YEARS 1995-2001

COMMODITY GROUPS	Rank Value 2001	1995	1996	1997	1998	1999	2000	2001	2000-01 Percent Change	1995-01 Percent Change
FRESH VEGETABLES 2/	1	$1,258,369	$1,471,445	$1,476,006	$1,859,897	$1,746,468	$1,905,840	$2,187,917	15%	74%
MISCELLANEOUS FRUITS & VEGGIES 1	2	$731,540	$887,413	$1,048,424	$1,243,969	$1,424,861	$1,605,305	$1,828,766	14%	150%
OTHER FRESH FRUITS	3	$1,436,454	$1,501,170	$1,542,652	$1,646,927	$1,713,622	$1,689,367	$1,765,941	5%	23%
FRESH DECIDUOUS FRUITS	4	$398,048	$509,899	$497,511	$548,516	$703,492	$710,391	$772,931	9%	94%
FROZEN VEGETABLES	5	$289,589	$328,503	$404,430	$471,135	$557,046	$611,058	$645,167	6%	123%
NURSERY PRODUCTS 3/	6	$238,572	$285,277	$319,109	$364,479	$398,809	$456,959	$487,945	7%	105%
JUICES	7	$383,653	$594,790	$524,665	$429,848	$551,720	$495,035	$419,333	-15%	9%
CUT FLOWERS	8	$343,504	$388,035	$404,868	$415,905	$395,009	$380,360	$342,967	-10%	0%
CANNED VEGETABLES	9	$172,060	$161,263	$178,907	$221,023	$280,893	$239,244	$285,463	19%	66%
FRESH MELONS	10	$173,275	$204,472	$229,498	$249,173	$288,254	$258,689	$283,953	10%	64%
WINE AND WINE PRODUCTS	11	$58,224	$111,573	$153,697	$145,657	$162,997	$216,860	$239,084	10%	311%
TREE NUTS	12	$211,868	$210,777	$221,892	$229,181	$225,055	$267,038	$169,690	-36%	-20%
CANNED FRUITS	13	$76,996	$71,946	$93,423	$97,539	$109,160	$115,655	$121,814	5%	58%
FROZEN FRUIT	14	$61,216	$69,241	$79,017	$77,948	$110,244	$106,581	$102,694	-4%	68%
ESSENTIAL OILS	15	$125,955	$103,570	$96,182	$94,435	$79,153	$108,580	$95,790	-12%	-24%
FRESH CITRUS	16	$41,789	$44,895	$52,139	$49,255	$94,591	$74,332	$89,024	20%	113%
POTATOES	17	$56,620	$89,955	$64,480	$96,814	$89,219	$77,077	$67,184	-13%	19%
DRIED VEGETABLES	18	$34,075	$35,717	$44,088	$52,112	$51,853	$60,850	$66,964	10%	97%
MISCELLANEOUS PREPARED FRUITS	19	$34,291	$33,788	$32,197	$28,039	$33,289	$32,239	$38,752	20%	13%
DRIED FRUITS	20	$19,293	$25,153	$22,657	$24,602	$33,617	$30,244	$26,123	-14%	35%
OLIVES	21	$6,214	$1,270	$4,616	$6,085	$3,350	$2,735	$7,509	175%	21%
GINSENG	22	$1,020	$1,915	$1,513	$2,188	$909	$1,784	$907	-49%	-11%
HOPS	23	$657	$268	$442	$0	$2	$0	$0	na	-100%
TOTAL		**$6,153,281**	**$7,132,334**	**$7,492,412**	**$8,354,725**	**$9,053,611**	**$9,446,222**	**$10,045,917**	**6%**	**63%**

1/ Some products included in this category are soup broths, beers, baby food, and potato chips.
2/ Does not include potatoes.
3/ Does not include cut flowers.

Source: U.S. Department of Commerce, Bureau of the Census

U.S. EXPORTS OF HORTICULTURAL PRODUCTS
TO COUNTRIES OF THE PROPOSED FTAA
EXPORTED VALUE BY COUNTRY OF DESTINATION
($1,000 DOLLARS)
CALENDAR YEARS 1995-2001

COMMODITY GROUPS	Rank Value 2001	1995	1996	1997	1998	1999	2000	2001	2000-01 Percent Change	1995-01 Percent Change
CANADA	1	$2,571,465	$2,670,793	$2,952,809	$3,059,427	$3,107,948	$3,268,974	$3,334,655	2%	30%
MEXICO	2	$329,437	$404,311	$499,668	$607,185	$755,192	$886,905	$1,010,384	14%	207%
VENEZUELA	3	$29,606	$28,612	$43,631	$56,284	$70,606	$53,577	$69,293	29%	134%
BRAZIL	4	$153,762	$131,984	$108,910	$92,268	$64,685	$67,806	$64,715	-5%	-58%
THE BAHAMAS	5	$69,363	$79,136	$52,802	$37,935	$44,767	$63,381	$53,516	-16%	-23%
DOMINICAN REPUBLIC	6	$25,606	$31,196	$37,646	$44,766	$50,459	$46,549	$50,156	8%	96%
PANAMA	7	$32,780	$31,532	$37,666	$47,487	$52,685	$44,936	$42,554	-5%	30%
GUATEMALA	8	$23,777	$23,348	$26,074	$32,528	$41,202	$42,681	$42,540	0%	79%
COLOMBIA	9	$46,100	$44,869	$51,911	$52,306	$36,304	$36,833	$34,372	-7%	-25%
NETHERLANDS ANTILLES	10	$32,158	$39,209	$44,032	$39,378	$36,537	$34,645	$34,083	-2%	6%
COSTA RICA	11	$20,973	$18,407	$18,987	$22,902	$29,548	$30,804	$31,454	2%	50%
ARGENTINA	12	$41,975	$32,918	$38,415	$39,541	$39,995	$33,444	$30,027	-10%	-28%
HONDURAS	13	$13,478	$12,371	$13,506	$18,631	$29,754	$29,455	$29,657	1%	120%
CHILE	14	$15,741	$17,915	$19,233	$15,669	$13,697	$19,035	$27,016	42%	72%
JAMAICA	15	$9,271	$11,695	$16,859	$19,541	$22,128	$24,590	$25,171	2%	172%
BERMUDA	16	$18,507	$16,700	$20,170	$23,719	$20,980	$32,436	$25,146	-22%	36%
LEEWARD-WINDWARD ISLAND	17	$16,939	$15,057	$18,047	$18,936	$16,964	$21,583	$20,486	-5%	21%
TRINIDAD AND TOBAGO	18	$8,495	$7,893	$9,103	$10,911	$11,879	$15,628	$19,260	23%	127%
CAYMAN ISLAND	19	$5,820	$9,623	$21,857	$23,849	$18,195	$19,177	$15,765	-18%	171%
EL SALVADOR	20	$10,013	$7,713	$8,113	$13,157	$17,930	$21,829	$14,508	-34%	45%
BARBADOS	21	$7,175	$12,647	$11,091	$10,130	$11,817	$10,016	$13,737	37%	91%
ECUADOR	22	$16,666	$12,705	$18,181	$14,032	$7,350	$7,732	$13,193	71%	-21%
HAITI	23	$9,475	$9,350	$12,979	$12,285	$10,143	$9,790	$11,262	15%	19%
PERU	24	$11,705	$12,979	$13,240	$10,501	$12,669	$8,976	$8,871	-1%	-24%
URUGUAY	25	$7,599	$7,189	$4,351	$3,153	$3,887	$5,960	$7,024	18%	-8%
NICARAGUA	26	$2,861	$2,341	$3,160	$3,779	$5,582	$5,908	$5,904	0%	106%
PARAGUAY	27	$14,531	$25,999	$26,143	$7,201	$7,765	$7,146	$3,621	-49%	-75%
BELIZE	28	$2,215	$1,885	$2,112	$2,839	$4,050	$5,547	$3,553	-36%	60%
GUYANA	29	$1,649	$2,453	$3,162	$2,766	$1,823	$2,348	$2,679	14%	62%
TURKS AND CAICOS ISLANDS	30	$2,263	$2,725	$3,824	$3,754	$4,858	$4,458	$2,137	-52%	-6%
BOLIVIA	31	$3,997	$4,118	$4,764	$2,517	$2,619	$1,191	$1,861	56%	-53%
SURINAME	32	$1,859	$3,058	$3,790	$3,120	$1,403	$1,264	$1,791	42%	-4%
FRENCH WEST INDIES	33	$3,082	$2,873	$2,966	$2,582	$3,193	$1,676	$840	-50%	-73%
FRENCH GUIANA	34	$107	$202	$437	$268	$140	$53	$109	106%	2%
FALKLAND ISLAND (ISLAS MALVINAS)	35	$0	$0	$0	$0	$0	$0	$3	na	na
TOTAL		**$3,560,483**	**$3,735,861**	**$4,149,638**	**$4,355,346**	**$4,558,753**	**$4,866,378**	**$5,051,340**	**4%**	**42%**

Source: U.S. Department of Commerce, Bureau of the Census

U.S. IMPORTS OF HORTICULTURAL PRODUCTS
FROM COUNTRIES OF THE PROPOSED FTAA
IMPORTED VALUE BY COUNTRY OF ORIGIN
($1,000 DOLLARS)
CALENDAR YEARS 1995-2001

COMMODITY GROUPS	Rank Value 2001	1995	1996	1997	1998	1999	2000	2001	2000-01 Percent Change	1995-01 Percent Change
MEXICO	1	$2,276,918	$2,558,567	$2,690,324	$3,356,166	$3,494,189	$3,552,428	$3,930,228	11%	73%
CANADA	2	$982,742	$1,152,772	$1,331,112	$1,586,091	$1,770,309	$2,027,113	$2,243,844	11%	128%
CHILE	3	$463,735	$640,381	$637,069	$634,578	$776,036	$856,195	$859,135	0%	85%
COSTA RICA	4	$478,742	$505,238	$543,094	$561,314	$641,274	$638,693	$662,301	4%	38%
COLOMBIA	5	$501,797	$524,416	$549,354	$548,585	$587,718	$587,048	$512,602	-13%	2%
ECUADOR	6	$337,494	$342,876	$396,496	$432,966	$451,151	$380,489	$414,932	9%	23%
GUATEMALA	7	$220,270	$233,469	$226,124	$278,830	$265,561	$320,874	$359,478	12%	63%
ARGENTINA	8	$168,619	$228,229	$243,893	$180,548	$250,297	$265,562	$266,193	0%	58%
BRAZIL	9	$278,451	$404,987	$331,768	$318,015	$381,126	$355,135	$256,507	-28%	-8%
HONDURAS	10	$195,098	$212,821	$194,778	$155,539	$66,228	$128,853	$166,217	29%	-15%
DOMINICAN REPUBLIC	11	$69,385	$89,174	$97,448	$97,592	$98,134	$98,377	$113,933	16%	64%
PERU	12	$43,921	$50,004	$54,873	$59,629	$101,608	$86,609	$111,417	29%	154%
JAMAICA	13	$23,994	$25,973	$26,018	$31,304	$31,453	$34,454	$37,836	10%	58%
BELIZE	14	$9,857	$13,868	$19,841	$11,350	$17,260	$27,400	$26,915	-2%	173%
VENEZUELA	15	$20,048	$27,290	$27,616	$29,955	$30,659	$20,570	$17,653	-14%	-12%
NICARAGUA	16	$4,899	$8,871	$11,530	$19,764	$12,259	$6,402	$14,923	133%	205%
BOLIVIA	17	$5,459	$9,244	$10,201	$10,056	$8,720	$11,494	$11,516	0%	111%
PANAMA	18	$42,023	$79,274	$71,141	$15,967	$43,809	$15,131	$11,293	-25%	-73%
EL SALVADOR	19	$6,542	$7,344	$8,167	$5,733	$4,807	$8,018	$9,863	23%	51%
TRINIDAD AND TOBAGO	20	$2,055	$3,079	$4,067	$4,588	$4,872	$7,570	$5,834	-23%	184%
HAITI	21	$12,648	$6,702	$8,790	$7,312	$8,863	$8,573	$4,414	-49%	-65%
THE BAHAMAS	22	$2,878	$2,721	$2,638	$2,641	$2,499	$2,592	$3,634	40%	26%
PARAGUAY	23	$1,843	$1,445	$1,472	$1,589	$1,782	$1,794	$1,935	8%	5%
NETHERLANDS ANTILLES	24	$650	$677	$1,576	$1,815	$918	$2,093	$1,066	-49%	64%
URUGUAY	25	$1,676	$1,478	$1,734	$898	$659	$1,335	$775	-42%	-54%
LEEWARD-WINDWARD ISLAND	26	$764	$902	$689	$816	$775	$673	$705	5%	-8%
GUYANA	27	$57	$176	$75	$288	$148	$503	$524	4%	819%
BARBADOS	28	$81	$105	$154	$175	$182	$120	$246	105%	204%
BERMUDA	29	$584	$199	$241	$598	$302	$121	$0	-100%	-100%
CAYMAN ISLAND	30	$12	$0	$80	$0	$0	$0	$0	na	-100%
FALKLAND ISLAND (ISLAS MALVINAS)	31	$0	$0	$0	$0	$6	$0	$0	na	na
FRENCH WEST INDIES	32	$27	$0	$0	$8	$8	$3	$0	-100%	-100%
SURINAME	33	$10	$51	$48	$14	$2	$3	$0	-100%	-100%
TOTAL		**$6,153,281**	**$7,132,334**	**$7,492,412**	**$8,354,725**	**$9,053,611**	**$9,446,222**	**$10,045,917**	**6%**	**63%**

Source: U.S. Department of Commerce, Bureau of the Census

World Trade Situation and Policy Updates

U.S. Food and Drug Administration (FDA) Blocks Imports of Mexican Cantaloupes

On October 28, 2002, the FDA issued an import alert advising officials at U.S. ports to detain cantaloupes from Mexico without physical examination. The alert was a result of unsanitary conditions in the cantaloupe growing and packing facilities in Mexico causing four Salmonellosis outbreaks during the past 3 years in the United States. FDA sampling found that some imported cantaloupes from most growing regions in Mexico tested positive for Salmonella. The October 28 import alert expands the prior warnings that targeted specific shippers and growers whose products were linked to outbreaks or tested positive for Salmonella. Trade sources estimate that the FDA action could result in losses amounting to at least $4 to $6 million per month if the situation is not resolved expeditiously. U.S. imports of cantaloupe from Mexico were valued at $46.4 million in CY2001. Cantaloupe imports from Mexico tend to ramp up in November, and peak during the period March-May.

USDA Announced Availability of Pest Risk Assessment for the Imports of Unshu Oranges from Korea

On November 4, 2002, USDA announced that they had prepared a pest risk assessment (PRA) for the importation of unshu oranges from Korea into U.S. citrus-producing states. Currently, unshu oranges from Korea are allowed in the United States/areas except for American Samoa, Arizona, California, Florida, Louisiana, the Northern Mariana Islands, Puerto Rico, Texas, and the U.S. Virgin Islands. Korean officials had, for a number of years, sought to gain access to the other U.S. states. Reports indicate that there is a niche market for unshus, especially in California, where a large number of Koreans live. In order to be considered, any comments to USDA's PRA need to be received on or before January 6, 2003.

Washington's Increased Production of Non-Traditional Apple Varieties to Boost Demand

The 2002/03 Washington apple crop is expected to continue to shift away from the traditional and widely grown Red and Golden Delicious varieties. The enhanced mix of varieties, combined with a larger crop and lower carry-in supplies from last season will more than likely boost the state's apple sales and improve the situation of the domestic industry. In response to changes in U.S. consumer preferences, apple growers in Washington increased planting of non-traditional varieties including Fuji, Gala, Pink Lady, McIntosh, Empire, Cameo, and Braeburn. U.S. exports, which in 2001/02 totaled nearly $370 million, could also benefit from the changing variety production trends. About 40 percent of U.S. annual apple exports are shipped to Latin America. Asia accounts for about 35 percent, and the Middle East and Europe for about 5 percent each. Canada alone accounts for about 15 percent of U.S. annual apple shipments.

Export News and Opportunities

Every U.S. exporter wants to get paid. However, credit can make or break a deal. It can shift the advantage to you or to your competitor. That's why many exporters turn to the U.S. Department of Agriculture's (USDA) Export Credit Guarantee Programs. With USDA's guarantee behind the credit, you can arrange competitive financing with less risk. Your buyers may benefit too, from longer terms and lower rates. As of October 25, USDA has made available $4.7 billion in credit guarantees to facilitate agricultural, fish, and forestry sales to selected countries. Invest the time to learn more about the Export Credit Guarantee Programs, (GSM-102) and Supplier Credit Guarantee Program (SCGP), to increase your sales and lower your risks. Use GSM and SCGP to avoid possible importer and foreign bank defaults on payments and ensure that American farm and food products continue to move to markets around the world. While USDA does not provide financing, it guarantees payments due to U.S. exporters in case the foreign banks or importers default. FY 2003 GSM and SCGP is effective October 1, 2002 through September 30, 2003. You may obtain a monthly list of commitment figures for GSM and SCGP at: http://www.fas.usda.gov/excredits/Monthly/ecg.html.

You may learn more about GSM-102 and SCGP regulations, country specific press releases and program announcements, and a Monthly Summary of Export Credit Guarantee Program Activity on the Internet at:

http://www.fas.usda.gov/export.html

GSM-102

The GSM-102 program makes available credit guarantees for sales of U.S. agricultural commodities overseas. USDA does not provide financing, but guarantees payments due from foreign banks. USDA typically guarantees 98 percent of the principal and a portion of the interest. The GSM-102 program covers credit terms from 90 days to 3 years.

Under the program, once a firm sale exists, the qualified U.S. exporter applies for a payment guarantee before the date of export. The U.S. exporter pays a fee calculated on the dollar amount guaranteed, based on a schedule of rates applicable to different lengths of credit periods. The CCC-approved foreign bank issues a dollar-denominated, irrevocable letter of credit in favor of the U.S. exporter, ordinarily advised or confirmed by the financial institution in the United States agreeing to extend credit to the foreign bank. The U.S. exporter may negotiate an arrangement to be paid as exports occur by assigning the U.S. financial institution the right to proceeds that may become payable under the guarantee, and later presenting required documents to that financial institution. Such documents normally include a copy of the export report. If a foreign bank fails to make any payment as agreed, the exporter or the assignee may file a claim with USDA for the amount due and covered by the guarantee. USDA will pay the U.S. bank and will take on the responsibility of collecting the overdue amount from the foreign bank.

On November 21, USDA authorized $3 million in credit guarantees for sales of U.S. agricultural commodities to Ghana.

On November 20, USDA amended the GSM-102 program for the Caribbean Region for fiscal year 2003. This amendment adds the British Virgin Islands and the Cayman Islands to the list of eligible destinations.

On November 20, USA amended the GSM-102 program for South Korea. For applications received for guarantee coverage on or after the date of this announcement, the amendment allows for annual payment intervals on credit terms up to 3 years.

On November 14, USDA authorized $15 million in credit guarantees for sales of U.S. agricultural commodities to Russia. Also $25 million was allocated for credit guarantees for Vietnam.

Supplier Credit Guarantee Program (SCGP)

The SCGP is unique because it covers short-term financing extended directly by U.S. exporters to foreign buyers and requires that the importers sign a promissory note in case of default on the CCC-backed payment guarantee. The SCGP emphasizes high-value and value-added products, but may include commodities or products that also have been programmed under the GSM-102 program.

The SCGP encourages exports to buyers in countries where credit is necessary to maintain or increase U.S. sales but where financing may not be available without CCC guarantees. Under the SCGP, CCC guarantees a portion of payments due from importers under short-term financing (up to 180 days) that exporters have extended directly to the importers for the purchase of U.S. agricultural commodities and products. These direct credits must be secured by promissory notes signed by the importers. CCC does not provide financing but guarantees payment due from the importer.

On November 21, USDA authorized $5 million in supplier credit guarantees for sales of U.S. agricultural commodities to Ghana under SCGP.

On November 20, USDA authorized $5 million in supplier credit guarantees for sales of U.S. agricultural commodities to Jordan.

On November 14, USDA authorized $20 million in supplier credit guarantees for sales of U.S. agricultural commodities to Russia. USDA also authorized $10 million in supplier credit guarantees for sales of U.S. agricultural commodities to Vietnam.

GSM-102 and SCGP

For most countries and regions announced under the FY 2003 GSM-102 and SCGP, exporters may apply for credit guarantees on a first-come-first-served basis to cover sales of any of the eligible commodities published in FAS program announcement PR 0346-02, issued September 24, 2001 or as superseded. The following horticultural products are eligible under the export credit guarantee programs: dried fruit; fresh fruit; frozen fruit; canned fruit; 100-percent fruit juices; fruit and vegetable concentrates, pastes, pulps and purees; honey; hops or hops extract;

beer; tree nuts; fresh vegetables; canned vegetables; dried vegetables; wine; and brandy. The General Sales Manager will consider requests to establish an SCGP and/or GSM Program for a country or region or amend an authorized program to include horticultural commodities and products that are currently not eligible.

(For further information on the SCGP or GSM-102 Program for horticultural commodities, contact Yvette Wedderburn Bomersheim on 202-720-0911).

Top U.S. Horticultural Product Exports By Value

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity	FY 1997	FY 1998	FY 1999	FY 2000	FY 2001	Oct. - Sept. FY 2001	Oct. - Sept. FY 2002
				--- 1,000 Dollars ---			
Almonds	879,032	772,891	696,818	580,815	686,081	686,081	744,666
Essential Oils	622,219	532,623	507,651	591,583	674,581	674,581	764,031
Wine & Wine Prdts.	390,376	510,923	545,287	538,143	549,045	549,045	517,582
Fresh Apples	412,855	328,068	375,869	336,444	414,808	414,808	360,968
Fresh Grapes	313,836	274,953	283,865	332,162	390,008	390,008	385,617
Frz. Potato Fries	294,417	313,209	343,216	339,553	359,847	359,847	342,639
Oranges	308,055	339,114	159,585	268,808	304,577	304,577	268,238
Orange Juice All	305,172	295,564	307,165	290,395	251,098	251,098	290,363
Proc. Tomatoes	229,526	233,209	220,380	221,306	227,450	227,450	228,458
Nursery Products	185,316	220,055	229,737	216,722	215,288	215,288	198,718
Fresh Lettuce	146,640	173,746	157,262	180,099	201,454	201,454	219,773
Beer	341,784	280,088	211,861	177,241	200,866	200,866	171,857
Grapefruit	240,408	189,744	221,443	208,329	199,813	199,813	201,272
Potato Chips	145,468	226,987	257,355	243,824	184,044	184,044	164,824
Walnuts	195,209	153,863	154,449	149,315	175,735	175,735	189,022
Fresh Cherries	140,650	113,556	154,793	169,516	159,852	159,852	149,914
Prunes	138,398	133,732	133,885	131,697	152,507	152,507	133,469
Raisins	204,388	199,733	198,817	145,861	151,155	151,155	152,839
Fresh Tomatoes	123,789	122,345	127,153	148,312	150,890	150,890	135,662
Proc. Sweet Corn	167,490	139,068	148,050	146,591	120,736	120,736	124,045
Total Other	4,838,913	4,765,679	4,864,543	5,121,136	5,292,064	5,292,064	5,365,033
GRAND TOTAL	10,623,941	10,319,150	10,299,184	10,537,852	11,061,899	11,061,899	11,108,990

Top U.S. Horticultural Product Exports By Volume

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity	FY 1997	FY 1998	FY 1999	FY 2000	FY 2001	Oct. - Sept. FY 2001	Oct. - Sept. FY 2002
Fresh Apples	690,595	539,685	664,969	571,860	743,644	743,644	592,428
Oranges	569,739	609,433	247,419	490,867	541,444	541,444	451,936
Frz. Potato Fries	396,738	438,425	468,826	469,287	505,549	505,549	482,081
Orange Juice All	565,332	553,175	554,951	550,888	464,026	464,026	685,945
Grapefruit	484,417	387,216	428,784	390,958	389,629	389,629	396,413
Fresh Onions	265,859	292,328	257,089	333,775	357,446	357,446	305,405
Fresh Lettuce	294,571	303,816	312,563	328,600	350,079	350,079	386,402
Wine & Wine Prdts.	208,786	266,294	274,696	281,475	311,953	311,953	271,925
Fresh Grapes	236,400	214,569	221,158	272,901	303,396	303,396	293,615
Beer	536,362	425,523	330,158	278,522	301,947	301,947	249,380
Proc. Tomatoes	293,112	300,327	264,369	277,277	297,041	297,041	297,308
Almonds	187,953	202,968	200,847	220,099	259,716	259,716	293,328
Fresh Melons	219,695	211,310	247,448	250,860	234,690	234,690	280,933
Fresh Tomatoes	153,657	133,687	148,271	181,892	173,336	173,336	161,755
Pears	126,603	156,807	145,816	162,629	158,333	158,333	175,337
Fresh Broccoli	130,999	126,791	154,514	182,848	157,406	157,406	153,129
Proc. Sweet Corn	203,613	171,294	186,153	187,818	150,693	150,693	141,317
Peaches	103,442	80,023	97,974	113,098	129,292	129,292	127,390
Lemons	120,330	113,392	113,931	106,249	110,373	110,373	99,909
Raisins	115,215	120,741	104,225	83,832	110,035	110,035	116,018

1/ Wine and beer is reported in 1,000 liters, orange juice in 1,000 single strength liters, and all other groups in 1,000 kilograms.

Source: U.S. Department of Commerce, Bureau of the Census.

Top U.S. Horticultural Product Imports By Value

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity 1/	FY 1997	FY 1998	FY 1999	FY 2000	FY 2001	Oct. - Sept. FY 2001	Oct. - Sept. FY 2002
				--- 1,000 Dollars ---			
Beer	1,443,326	1,677,002	1,865,038	2,126,018	2,296,189	2,296,189	2,526,251
Wine & Wine Prdts.	1,629,254	1,829,709	2,150,057	2,271,185	2,284,016	2,284,016	2,597,817
Bananas & Plantns	1,194,458	1,188,442	1,180,227	1,098,409	1,125,986	1,125,986	1,157,251
Nursery Products	565,267	632,672	673,194	745,977	789,187	789,187	801,891
Fresh Tomatoes	611,612	735,180	713,121	608,428	755,074	755,074	640,968
Fresh Grapes	386,183	440,659	545,409	518,260	580,879	580,879	669,167
Cut Flowers	572,926	630,067	578,766	623,213	577,480	577,480	543,815
Fresh Peppers	251,908	343,606	324,880	451,848	507,973	507,973	358,185
Cashews	292,315	339,490	390,111	487,687	366,770	366,770	368,187
Frz. Potato Fries	156,831	216,576	252,437	321,914	338,228	338,228	365,434
Essential Oils	322,447	350,086	315,861	309,570	300,148	300,148	334,305
Fresh Melons	226,502	250,921	277,880	259,797	285,714	285,714	264,564
All Apple Juices	354,632	228,735	210,263	278,975	230,401	230,401	225,518
Olives	184,217	181,730	200,293	184,928	204,762	204,762	213,688
Fresh Cucumbers	100,823	154,634	138,241	168,771	200,539	200,539	161,058
All Orange Juices	240,072	211,353	285,947	243,298	185,182	185,182	158,831
Fresh Onions	127,447	151,990	135,574	131,705	168,119	168,119	150,410
Fresh Mangos	123,009	125,047	138,823	142,010	152,097	152,097	146,265
Fresh Pineapple	74,441	83,676	121,679	117,539	151,773	151,773	178,672
Total Other	4,222,577	4,604,941	5,368,446	5,315,151	5,521,799	5,521,799	6,330,443
GRAND TOTAL	13,080,247	14,376,516	15,866,247	16,404,683	17,022,316	17,022,316	18,192,720

1/ Nursery Products excludes cut flowers.

Top U.S. Horticultural Product Imports By Volume

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity 1/ 2/	FY 1997	FY 1998	FY 1999	FY 2000	FY 2001	Oct. - Sept. FY 2001	Oct. - Sept. FY 2002
Beer	1,612,379	1,869,577	2,072,394	2,290,532	2,490,362	2,490,362	2,671,157
Wine & Wine Prdts.	432,192	428,664	420,152	481,164	510,722	510,722	588,674
Bananas & Plantns	3,911,294	4,135,832	4,369,283	4,350,838	4,046,727	4,046,727	4,144,202
Nursery Products	2,206,085	2,460,306	2,765,772	2,860,569	2,926,930	2,926,930	3,079,188
Fresh Tomatoes	743,205	856,852	722,591	708,690	868,191	868,191	686,396
Fresh Grapes	857	1,039	978	1,185	1,060	1,060	1,280
Cut Flowers	2,770,092	2,770,186	2,707,948	2,804,568	2,642,815	2,642,815	2,607,545
Fresh Peppers	284,221	319,671	345,444	352,169	346,582	346,582	313,371
Frz. Potato Fries	269,794	353,931	397,455	470,605	519,789	519,789	604,798
Fresh Melons	779,005	860,437	873,032	898,995	878,305	878,305	899,054
All Apple Juices	1,084,986	1,016,823	1,140,355	1,171,502	1,231,801	1,231,801	1,300,559
Fresh Cucumbers	302,306	327,745	336,045	346,863	373,629	373,629	334,673
All Orange Juices	1,116,798	1,063,239	1,326,231	1,284,749	976,357	976,357	714,339
Fresh Onions	261,088	259,188	246,532	224,080	269,179	269,179	267,497
Fresh Mangos	191,115	188,767	212,992	231,078	229,473	229,473	255,570
Fresh Pineapple	171,253	255,533	272,601	304,207	333,479	333,479	377,875
Fresh Squash	141,192	157,537	151,916	156,520	168,099	168,099	172,817
Frozen Broccoli	169,458	153,962	186,187	164,090	168,988	168,988	184,091
Fresh Apples	168,564	156,700	158,550	170,490	156,593	156,593	164,587

1/ Wine and beer is reported in 1,000 liters, orange juice in 1,000 single strength liters, and all other groups in 1,000 kilograms.

2/ Nursery Products excludes cut flowers.

Source: U.S. Department of Commerce, Bureau of the Census.

Selected Horticultural Crop Prices Received By U.S. Growers

Commodity	Domestic units	2001 Oct	2002 Sep	2002 Oct \1	% Change Last Month	% Change Last Year
			Dollars/unit			
Grapefruit 2/	Box	6.53	5.81	5.1	-12.2%	-21.9%
Lemons 2/	Box	19.12	15.97	16.82	5.3%	-12.0%
Limes 2/	Box	0	0	0	n/a	n/a
Oranges 2/	Box	4.99	6.31	4.71	-25.4%	-5.6%
Tangelos 2/	Box	0	0	0	n/a	n/a
Tangerines 2/	Box	8.23	0	8.37	n/a	1.7%
Temples 2/	Box	0	0	0	n/a	n/a
Apples, fresh 3/	Lb.	0.248	0.3	0.301	0.3%	21.4%
Grapes	Ton	640	650	640	-1.5%	0.0%
Peaches	Lb.	0	0.278	0	-100.0%	n/a
Pears, fresh 3/	Ton	390	474	458	-3.4%	17.4%
Strawberries, fresh	Lb.	0.807	0.584	0.69	18.2%	-14.5%
Asparagus 4/	Cwt.	137	0	0	n/a	-100.0%
Broccoli 4/	Cwt.	24.2	40.6	23	-43.3%	-5.0%
Cantaloupes	Cwt.	15.7	14	15	7.1%	-4.5%
Carrots 4/	Cwt.	17.5	19	17.3	-8.9%	-1.1%
Cauliflower 4/	Cwt.	21.7	23	19.6	-14.8%	-9.7%
Celery 4/	Cwt.	8.22	11.7	9.58	-18.1%	16.5%
Sweet Corn 4/	Cwt.	23.8	20.7	19	-8.2%	-20.2%
Cucumbers 4/	Cwt.	14.2	17.7	13.3	-24.9%	-6.3%
Lettuce 4/	Cwt.	11.5	14.3	12.3	-14.0%	7.0%
Onions 4/	Cwt.	9.2	11	10.6	-3.6%	15.2%
Snap Beans 4/	Cwt.	63.1	68.1	52	-23.6%	-17.6%
Tomatoes 4/	Cwt.	28.6	22.2	23.5	5.9%	-17.8%

1/ Preliminary
2/ Equivalent on-tree returns.
3/ Equivalent packinghouse-door returns for CA and NY (apples only), OR (pears only), and WA (apples, peaches, and pears). Prices as sold for other states.
4/ Fresh-market, FOB shipping point.

Weight per box of citrus.
Grapefruit : AZ, CA = 67 Lbs., Florida = 85 Lbs., and Texas = 80 Lbs. per box.
Lemons: AZ, CA = 76 Lbs. per box.
Limes: Florida = 88 Lbs. per box.
Oranges: AZ, CA = 75 Lbs., Florida = 90 Lbs., and Texas = 85 Lbs. per box.
Tangelos and Temples: Florida 90 Lbs. per box.

Note: Zeroes indicate insufficient information or insufficient sales to establish a price.
Source: National Agricultural Statistics Service (NASS), USDA.